

# Educational Planning in the Pacific

## *Principles and Guidelines*



*Edited by Priscilla Puamau  
and Bob Teasdale*

The PRIDE Project  
Pacific Education Series No.1  
2005



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*Priscilla Puamau and G.R. (Bob) Teasdale*

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The University of the South Pacific  
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Emery Wenty  
A class of 5th grade students at Koror Elementary School, Palau.  
Mrs Wenty (far R back) is teacher for this class. With about 700  
students, this is the largest elementary school in Palau.

Title page photo:  
Palau Ministry of Education  
Students from Koror Elementary School, Palau.

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## Preface

This book is the first in a series published by the PRIDE Project (Pacific Regional Initiatives for the Delivery of basic Education). Launched in 2004, the Project is funded jointly by the European Union (EU) and the New Zealand Agency for International Development (NZAID). It serves fifteen nations in the Pacific region: Cook Islands, Federated States of Micronesia (FSM), (Republic of the) Fiji Islands, Kiribati, (Republic of the) Marshall Islands (RMI), Nauru, Niue, Palau, Papua New Guinea (PNG), Samoa, Solomon Islands, Tokelau, Tonga, Tuvalu and Vanuatu. The Project seeks to improve the quality of basic education by helping each country to develop and implement strategic plans that are built on a strong foundation of local cultures and values, yet draw on the best that the global world of education has to offer.

In preparing this book we are deeply grateful to our colleagues who contributed to it. In particular, we acknowledge the valuable input of the National Project Coordinators (NPCs) and data managers who attended our first regional workshop (see Appendix A). Their willingness to share their insights and experience has added greatly to the depth and relevance of the book.

We also thank Dr Shrinivasiah Muralidhar, Head of the Department of Education and Psychology at the University of the South Pacific (USP), for opening the workshop and reminding us that all planning should be linked to learning in the classroom, and that everything we do should have positive learning outcomes. We are also indebted to the resource people at the workshop: Ms Rebecca McHugh, Dr ‘Uhila Fasi and Mrs Monica Driu Fong. We sincerely thank Dr ‘Ana Taufe‘ulungaki, Director of the USP Institute of Education (IOE), and her team for their support and input: Mr Henry Elder, Dr Seu‘ula Johannson Fua and Ms Vasiti Nalatu. Last but not least, we thank the authors who contributed to this volume. Without their patience and goodwill in redrafting material they presented at the workshop this book would not be in your hands right now.

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## Portraits of the contributors

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Dr Fasi is Professional Officer, Information and Communications Technology and Research, at the South Pacific Bureau for Educational Assessment (SPBEA) in Suva. He began work as a secondary teacher of mathematics and the sciences in the Kingdom of Tonga and subsequently became that country's Chief Education Officer (Examinations). He also served as Principal of Tonga National Form 7 School and the Tonga Institute of Science and Technology. He obtained a Bachelor of Science and Graduate Certificate in Education from USP. His postgraduate studies in the United Kingdom led to the award of an MA from the University of Lancaster in the field of educational evaluation and measurement, and a PhD from the University of Reading. His interest areas are in educational assessment and measurement, mathematics education and teacher education.

### *Seu'ula Johansson Fua*

Dr Johansson Fua received her BA, BEd and Diploma in Teaching from the University of Waikato, New Zealand, in 1998. She was awarded a Commonwealth Scholarship in 1999 to pursue graduate studies in Canada. In 2001 she received her MA and in 2003 her PhD (Educational Administration), both from the University of Toronto. Her graduate work included two theses in educational leadership in relation to Tongan administrators. She has worked for the Tonga Ministry of Education as a secondary school teacher and as a planning officer. She is currently a Fellow in the Institute of Education at the University of the South Pacific. Her areas of interest include research, leadership, values and organisational evaluation.

### *Uke Kombra*

Mr Kombra received a Diploma in Secondary Teaching from the University of Papua New Guinea (UPNG), a Bachelor of Education (Administration) degree from the University of Goroka, and two Master of Educational Administration degrees, the second at Honours level, from the University of New England in

Australia. He began his career as a secondary school teacher in 1983, later working as a principal before becoming the first Provincial Education Reform Coordinator in the Western Highlands Province. After his BEd studies he joined the PNG National Department of Education (NDOE) as the National Coordinator for Planning. He was a member of the team that developed the National Education Skills Plan and the National Education Plan Update 1. He now serves as Assistant Secretary for Planning in the NDOE and most recently has assisted with the development of PNG's National Education Plan 2005–2014.

### ***Rebecca McHugh***

Ms McHugh graduated from the University of Queensland, Australia, with a Bachelor of Arts degree, majoring in Sociology and International Relations. Upon completion of her studies she worked for a year as a volunteer lecturer at the Viet Nam National University, before working for the Foundation for Development Cooperation in Brisbane as a researcher. She is currently a Project Coordinator with UniQuest, the consulting and knowledge commercialisation company of the University of Queensland. Since joining UniQuest, Rebecca has worked with the Ministry of Education, Youth and Sports in Kiribati, and the Ministry of Education and Human Resource Development in Solomon Islands, supporting the development and implementation of Education Management Information Systems to assist with collection, analysis and reporting of education statistics for policy making and strategic planning. Rebecca has broad research interests in the social sciences, and has recently become interested in the role of information and communication technologies for development. She is currently undertaking a Masters degree in International and Community Development through Deakin University, Melbourne.

### ***Priscilla Puamau***

Dr Puamau is an Education Adviser with the PRIDE Project at USP. She graduated with a Bachelor of Arts, Graduate Certificate in Education, Postgraduate Diploma in Education and Masters of Arts in Education from USP, Fiji, and received a PhD in Education from the University of Queensland, Australia. She has worked for over 20 years as a secondary school teacher with the Fiji Ministry of Education, including service as Head of the Language Department, and acting Senior Education

Officer (Fijian Education). She has also been involved in teacher training in her capacity as Head of the School of Education, Vice Principal and Principal at the Fiji College of Advanced Education (FCAE). Her areas of interest lie in teacher education, values education and indigenous education. Priscilla is the current president of the Pacific Association of Teacher Educators (PATE).

***GR (Bob) Teasdale***

Dr Teasdale is the Director of the PRIDE Project at the University of the South Pacific (USP). He has worked on several other projects at USP, including the coordination of the first 'Future Directions' review in 1983. Bob is from Adelaide, South Australia, where he taught at Flinders University for 34 years, and was active in research and consultancy in the fields of indigenous, cross-cultural, comparative and international education, and in values education. From 1997 to 2003 he was Director of the Flinders University Institute of International Education.

***Epeli Tokai***

Mr Tokai is an Education Adviser with the PRIDE Project. His areas of expertise are in educational planning and management, education finance, educational policy, education statistics, educational leadership, and project management. Epeli previously worked in the Fiji Ministry of Education for 22 years, first as a secondary school teacher, then as Senior Education Officer (Educational Planning), as Head of the Research and Development Section, and as Project Manager (Local) for the Fiji Education Sector Program (FESP), a project funded by AusAID. He graduated with a Diploma in Education (Industrial Arts) and a Bachelor of Education (Technology) from USP in 1981 and 1987 respectively, a Masters in Education Policy and Administration from Monash University, Australia in 1996 and the International Diploma in Educational Planning and Management from the UNESCO International Institute for Educational Planning in Paris in 2002.

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## Abbreviations

AusAID	Australian Agency for International Development
DoE	Department of Education (PNG)
EDF	European Development Fund
EFA	<i>Education for All</i> (UNESCO)
EMIS	Education management information system
ESP	Education Strategic Plan
EU	European Union
<i>FBEAP</i>	<i>Forum Basic Education Action Plan</i>
FCAE	Fiji College of Advanced Education
FESP	Fiji Education Sector Programme
FSM	Federated States of Micronesia
ICT	Information and communications technology
IOE	Institute of Education (USP)
KEMIS	Kiribati Education Management Information System
MDG(s)	Millennium Development Goal(s)
MEHRD	Ministry of Education and Human Resources Development (Solomon Islands)
MEYS	Ministry of Education, Youth and Sport (Kiribati)
MoE	Ministry of Education (Fiji; Nauru; generic)
NDOE	National Department of Education (PNG)
NGO(s)	Non-government organisation(s)
NPC(s)	National Project Coordinator(s)
NZ	New Zealand
NZAID	New Zealand Agency for International Development

PATE	Pacific Association of Teacher Educators
PEB	Provincial Education Board
PEDMS	Pacific Education Database Management System
PIF	Pacific Islands Forum
PIFS	Pacific Islands Forum Secretariat
PNG	Papua New Guinea
PRIDE	Pacific Regional Initiatives for the Delivery of basic Education
RDS	Research and Development Section
RMI	Republic of the Marshalls Islands
SEO	Senior Education Officer
SIEMIS	Solomon Islands Education Management Information System
SPBEA	South Pacific Board for Educational Assessment
SWOT	Strengths, weaknesses, opportunities, threats
TVET	Technical and vocational education and training
UK	United Kingdom
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UPNG	University of Papua New Guinea
USA	United States of America
USP	University of the South Pacific

## **Introduction**

*G.R. (Bob) Teasdale and Priscilla Puamau*

This book reviews the way education has been planned in the Pacific, and seeks to develop new approaches that reflect the values and ways of thinking of Pacific cultures. It does not reject the planning processes of the global world. Rather, it seeks to identify the best that the global world has to offer, and to blend it with the local to create new and more culturally appropriate ways of planning.

The development of new ways of planning that draw on the ways of thinking and knowing of the Pacific is a big challenge. The old colonial ways of developing and managing education systems have had a pervasive impact in the Pacific, and are deeply resistant to change. Colonial assumptions about the nature of the Pacific and the needs of its people need to be much more carefully and critically questioned.

For example, those who occupy continents on the rim usually view the Pacific Ocean as a vast expanse of water dotted with tiny, isolated islands, their inhabitants disadvantaged by smallness and remoteness. Pacific Islanders are now rejecting this colonial assumption, arguing that they do not occupy 'islands in a far sea', but 'a sea of islands' (Hau'ofa, 1993:7). Their ancestors clearly viewed the sea not as a barrier, but as their livelihood and highway. They were seafarers who were equally at home on sea as on land. They lived and played and worked upon it. They developed great skills for navigating its waters, traversing it in their sailing canoes, and forming a 'large exchange community in which wealth and people with their skills and arts circulated endlessly' (Hau'ofa, 1993:9). In this way the sea bound them together rather than separating them.

This idea of 'a sea of islands' captures a holistic sense of people sharing a common environment and living together for their mutual benefit. Many people in the Pacific are attempting to reactivate this ethos, seeking ways to help and support

each other, rather than constantly turning to the nations on their Ocean's rim for aid and advice. It is, however, a slow and uneven process, much hindered by regional politics, by the insistent pressures of globalisation and by the continuing impact of colonialism, which not least, has divided the Pacific linguistically, creating a gulf between groups of English-speaking and French-speaking islands. It has also divided the Pacific politically, with France and the USA still ruling their colonial empires in the Pacific in ways that isolate their people from many regional forums and networks.

Somewhat constrained by such divisions, this book focuses only on those countries that are politically independent and therefore able to participate in the dominant political and economic policy grouping in the Pacific, the Pacific Islands Forum (PIF, but familiarly known as the Forum): Cook Islands; Federated States of Micronesia (FSM); Fiji Islands (usually referred to in this volume as elsewhere simply as Fiji); Kiribati; Nauru; Niue; Palau; Papua New Guinea (PNG); Republic of the Marshall Islands (RMI); Samoa; Solomon Islands; Tonga; Tuvalu and Vanuatu. To this list should be added Tokelau, which is in the process of achieving self-government in free association with New Zealand, a similar status to that enjoyed by Cook Islands and Niue. Australia and New Zealand are also full members, but given their metropolitan heritage, they are not included in this chapter.

Founded in 1971, the Forum brings heads of member governments together annually for dialogue and decision-making on regional policy issues, and is administered by a large secretariat (PIFS) based in Suva, Fiji. At its meeting in Palau in November 1999 there was considerable debate about human resource needs in the Pacific, and the failure of most education systems to satisfy them, thereby perpetuating the region's dependence on highly paid people from elsewhere. Schools and their curricula were criticised for not providing relevant life and work skills, for being too focused on academic success in external examinations, and for not graduating young people who could become productive members of their own villages or urban communities. Accordingly, the Forum directed its secretariat to bring together the Ministers for Education of the region, asking them to deal with the concerns that had been articulated.

The Ministers eventually met eighteen months later in Auckland, deliberating on what they referred to as ‘basic education’, which they defined as all educational provisions for children and youth, both formal and non-formal, except for higher education. The major outcome of the meeting was the development of the *Forum Basic Education Action Plan (FBEAP)* (PIFS, 2001), a short but important document setting out visions, goals and strategies for the future of basic education in the Pacific. Its vision is clearly specified:

Basic education as the fundamental building block for society should engender the broader life skills that lead to social cohesion and provide the foundations for vocational callings, higher education and lifelong learning. These when combined with enhanced employment opportunities create a higher level of personal and societal security and development.

Forum members recognised that development of basic education takes place in the context of commitments to the world community and meeting the new demands of the global economy, which should be balanced with the enhancement of their own distinctive Pacific values, morals, social, political, economic and cultural heritages, and reflect the Pacific’s unique geographical context. (PIFS, 2001:1–2)

The Ministers requested the secretariat to ensure the implementation of *FBEAP*, and recommended that they themselves continue meeting on a regular basis to monitor and support this process. Following this first meeting, discussions took place with representatives of the European Union (EU) and a provisional agreement was reached that funding for a project to implement *FBEAP* might be made available under the union’s 9<sup>th</sup> EDF Pacific Regional Indicative Programme. By the time the Ministers came together for their second meeting in December 2002 these plans were well developed, and a sub-committee of Ministers was formed to finalise a submission.

This sub-committee, under the leadership of the Samoan Minister of Education, the Honourable Afioga Fiame Naomi Mata’afa, developed a proposal in the form of a Project Financing Agreement, which was accepted by the EU, for funding of €8 million over a five-year period for a new project to be called ‘Pacific Regional Initiatives for the Delivery of basic Education’, abbreviated to ‘The PRIDE Project’. The University of the South Pacific (USP) agreed to manage the Project on behalf

of PIFS, and the New Zealand Government, through NZAID, agreed to join as a funding partner with an initial grant of NZ\$5 million over three years. The Project was officially launched at USP by the Samoan Minister for Education on 14 May 2004 in conjunction with the first meeting of the Project Steering Committee.

### **The PRIDE Project**

Essentially the Project is designed to implement, in the fourteen Pacific member states of PIF, together with Tokelau, the Pacific vision for education encapsulated in *FBEAP*. Its overall objective is:

To expand opportunities for children and youth to acquire the values, knowledge and skills that will enable them to actively participate in the social, spiritual, economic and cultural development of their communities and to contribute positively to creating sustainable futures. ([www.usp.ac.fj/pride](http://www.usp.ac.fj/pride))

To achieve this objective, the Project seeks to strengthen the capacity of each of the fifteen countries to deliver quality education through formal and non-formal means. The key outcome will be the development of strategic plans for education in each country, plans that blend the best global approaches with local values and ways of thinking. Ideally these plans will be developed following wide consultation with all stakeholders and beneficiaries, including parents, teachers, students, NGOs, private providers, employers and other civil society groups. The Project also will assist countries to implement their plans and to monitor and evaluate the outcomes. Capacity building activities will be provided for educators at national, sub-regional and regional levels. To give further support to these activities the Project will develop an online resource centre to encourage the sharing of best practice and experience amongst countries.

In discussions of the PRIDE Project with educators throughout the Pacific and beyond, a frequently asked question has been: 'How is it different? We have seen many donor-driven education projects and initiatives come and go: why is this one unique?' Their cynicism is justified. The history of educational aid in the Pacific, as elsewhere, is an ambiguous one, with at least as many negatives as positives. The present project, however, does have a number of unique features,

and there is considerable optimism that it can achieve its goals in ways that others have not. Six of these features are listed here.

1) The Project was designed and approved by the Ministers of Education: the process started with them, not with the donors. It was very clear at their third PIFS-sponsored meeting in Apia in January 2004 that Ministers saw this as ‘their’ project, and were determined to guide and direct it according to their priorities. Subsequent meetings with individual Ministers have reinforced this view. The donors, in turn, have shown quite remarkable preparedness to allow this to happen.

2) The Project is distinguished by the significance of the acronym: its choice clearly was deliberate, and reflects the wishes of the Ministers. Each country is being encouraged to build its education plans on a stronger foundation of local cultures, languages and epistemologies, thus enabling students to develop deep pride in their own values, traditions and wisdoms, and a clear sense of their own local cultural identity.

3) In strongly emphasising mutual collaboration and support, the aim of the Project is to help countries to help each other. Earlier projects brought consultants from outside the region, and therefore became donor-driven as they responded to donors’ priorities and preferences. The PRIDE Project will source most of its consultants from within the region, and already has built up an impressive data-base of qualified people from Pacific nations. Furthermore, it will fund local educators to go on study and training visits to each other’s countries, not to those on the rim and beyond.

4) The Project encourages consultative and participatory approaches to educational planning within each country: there is a clear wish to avoid top-down models of planning and policy-making, and a strong commitment to bottom-up processes involving parents, teachers, students, private providers, NGOs, employers and other civil society groups.

5) The Ministers want the Project to promote a more holistic and lifelong approach to education, with effective articulation between sectors, and between school, TVET and the world of work.

6) The PRIDE team is committed to building strong conceptual foundations for the Project. Earlier projects brought outsiders to the Pacific with western 'recipes' for the reform of education. The PRIDE team is committed to helping countries develop their own theoretical foundations, doing so via the creative fusion of their own epistemologies, values and wisdoms with the most useful ideas and approaches of the global world beyond their shores.

### **The first PRIDE Project workshop**

In September 2004 the Project held its first regional workshop in Lautoka, Fiji, bringing together an educational planner and a data manager from each of the fifteen countries it serves. The key focus of the workshop was strategic planning methodologies for basic education. In particular, the workshop sought to develop planning principles and processes that are firmly grounded in Pacific values and ways of thinking, yet are fully syncretised with the most tried and tested techniques of the globalised world beyond.

The workshop used an interactive, consultative and participatory approach. Much of the time was spent in small groups working collaboratively on pre-assigned tasks, sharing experiences, showcasing achievements, and sometimes even sharing approaches that did not work, and discussing why.

Before attending the workshop, participants were asked to reflect on any training they had received, or studies they had undertaken, in the field of strategic planning and/or data management. What had they learned that had really helped them as educational planners? What ideas worked particularly well in Pacific settings? What were their most significant achievements in the area of strategic planning?

They were asked also to talk with their colleagues, and perhaps with a few older, retired educators and friends, about the kinds of planning processes that have been used in their own society/culture, or are still being used. What are the underlying values, beliefs, wisdoms and epistemologies that have guided the way that Pacific people reflect on the future? How have people planned ahead?

**This book**

This book draws together many of the ideas that were shared at the workshop, as well as the conclusions that were reached during our discussions together. In particular it seeks to challenge anyone who may be involved in the planning of education in the Pacific to think about what they are doing from the perspective of their own local culture. Is it possible to develop planning methodologies that successfully blend the best of those in the global world with the values and ways of thinking of the cultures of the Pacific? The participants at the workshop clearly thought so, and we have done our best to reflect their ideas.

The workshop and this book, however, are just the beginning. We need to do a lot more thinking and talking together. The new approaches to planning suggested in this book will not happen overnight. They need to be tried and tested in real-life situations. We then need to review them carefully and critically. It will be a continuing process of moving forward, supporting each other, and learning from each other's successes and failures.

During the next few years the staff of the PRIDE Project will be working with colleagues around the Pacific to develop strategic plans for education that are realistic and relevant to the lives and futures of their children. We look forward to this challenge, and commit ourselves to giving of our very best.

This book is the first in a series of publications that we hope will make a significant contribution to a Pacific body of knowledge in education. Three more books are already in the planning stages in areas as diverse as language policies in education, the financing of education, and the implications of the PRIDE Project for the delivery of pre- and in-service teacher education.

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# 1

## The big picture

### International perspectives on education for planners

*G R (Bob) Teasdale*

This chapter seeks to reconceptualise the planning and implementation of education in the Pacific by reviewing how people are thinking about education globally. What are the new ideas, the new trends, and how are they changing the ways that schooling is taking place in our global world? What are the implications of these different ways of thinking for the planning and reform of education in the Pacific? And for the work of the PRIDE Project?

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1

#### **Conceptualising the Project**

To begin to understand the changes that are taking place in the way people think about education, and to help develop a conceptual foundation for the PRIDE Project, the PRIDE team turned to the Report to UNESCO of its International Commission on Education for the Twenty-first Century (Delors, 1996). The priorities of the Ministers for Education in Oceania, as expressed in the Project Financing Agreement, are in significant accord with current international theorising about education, and analysis of these broader perspectives is adding depth and focus to the conceptualisation of the Project.

From our own experiences in countries as diverse as Thailand, Japan and Indonesia, as well as the fifteen Pacific countries that are the focus of our work in the PRIDE Project, The Delors Report remains a particularly useful blueprint for reform, regardless of the economic, demographic and social indicators of each nation. In the eight years since it was published the Report has stood the tests of time, critical analysis and practical application. It has been widely debated in both educational and political circles, and its ideas used as a springboard for education reform in a wide variety of settings. It continues to offer the most coherent, inspiring and relevant conceptual foundation for education of any international document published in recent years.

The PRIDE team has also moved beyond the Delors Report, beginning to explore wider philosophical perspectives, including postmodernism. These ‘big picture’ changes in thinking and knowledge are beginning to have an impact on education globally, and it is important that we try to understand them and to question their implications both for the reform of education and for the Project. This chapter therefore begins with a brief look at some of the main trends.

### **From teaching to learning**

Ever since the invention of mass (eventually compulsory) schooling in the early years of the industrial revolution in Europe, the focus has been on the delivery of knowledge to children and youth by adults with the necessary training and/or community recognition. The architecture and routines of the school, and the content and processes of the curriculum, were primarily aimed at preparing the young to be compliant and productive workers in the new and expanding factories of Europe.

This new form of mass schooling was almost entirely teacher-centred, the podium and blackboard at the front of each classroom helping teachers to control their students and deliver their knowledge. A system of examinations and reporting regulated progression through the school, and provided incentives for students to acquire knowledge and the formal credentials for having done so. These credentials in turn were linked to subsequent employment. The higher the credentials the more prestigious and well-paid the job at the end. This was the system of education that was exported to Oceania during the colonial era, largely

by well-intentioned Christian missionaries, and that has proven so resistant to change in many countries.

This admittedly oversimplified account of a much more complex reality does highlight the view that the nineteenth and twentieth centuries, educationally speaking, can be characterised as those of the teacher. The teacher was central to educational discourse and process. This has been especially the case in Oceania, as it still is in many if not most settings.

The current change in focus to that of the learner, as exemplified in the Delors Report, is highly significant. Even though many might argue that teaching and learning are simply opposite sides of the same coin, and essentially one and the same, the reality is that education is undergoing a profound transformation. The shift in power from teacher to learner is just one element of this. Another significant shift is from education as the acquisition of knowledge, to education as learning how to learn. And a third is from a view of education as preparation for the world of work, to education as a holistic process of lifelong learning. From these perspectives the twenty-first century might well come to be described as the ‘century of the learner’.

The fact that the Ministers for Education in Oceania have requested the PRIDE Project to encourage a more holistic approach to education, with an emphasis on lifelong learning, is fully in tune with global developments, and has substantial implications, as suggested below.

- 1) The ICT (information and communications technology) revolution has ensured that teachers and lecturers are no longer the prime dispensers of knowledge. Their students now have access to an exponentially expanding array of information that they can access quite independently. Teachers have responsibility to help students make effective and appropriate use of this knowledge, which requires that they try to develop in students the capacity for critical appraisal of all of the material available to them, and for making value judgments of it, often from moral and ethical perspectives. School curricula therefore need to focus on developing the critical capacities of students, enabling them to know themselves and to think for themselves, thus becoming active and confident learners.

2) Knowledge is power. As teachers lose their authority as holders and dispensers of knowledge, their relationships with students are transformed. They need to become facilitators of learning, providing students with the skills and motivation to become lifelong learners. A much stronger focus on curriculum process therefore is required. *How* to teach becomes equally important as *what* to teach. And for these new relationships to be effective, teachers need a new kind of moral and even spiritual authority. They must become respected as exemplars of right living within their schools and communities. This requires a profound shift in the mindset of teachers, and even more importantly of their trainers, as they reconceptualise their roles and functions.

3) With the adoption of a more holistic approach to learning, the old boundaries between the various sectors of education (preschool, primary or elementary, secondary, technical/vocational) need to be reviewed, and the question of effective articulation between them addressed. There is a particular need to explore how the secondary school and Technical and Vocational Education and Training (TVET) curricula might be planned together in a more holistic and interconnected way. In the Pacific region, TVET programmes need to be brought down into the secondary school, and even to upper primary settings. In some countries the seventh and eighth years of schooling are the final ones for many students, and it is vital that relevant and meaningful TVET be available to them and that such programmes articulate with subsequent learning opportunities, especially in the nonformal sector.

4) As we take a more holistic and lifelong approach to learning, with a broader emphasis on preparation for life as well as work, questions need to be raised about the deeply entrenched system of external examinations in Oceania. This system has maintained the 'pyramid' structure, so typical of 'third world' education systems, a structure that in itself contributes, with implications of failure and rejection, to many children being pushed out of an increasingly selective school environment. A truly lifelong and learning-based approach will require totally new models of student monitoring and assessment. The PRIDE team looks forward to working with the South

Pacific Board for Educational Assessment as it seeks to introduce the idea of ‘assessment for learning’, using an outcomes based approach that aims to empower learners (see chapter 8).

### **Tensions and change**

Jacques Delors, in his preface to *Learning: the treasure within* (Delors, 1996), identifies and discusses seven tensions that he believes characterise most education policy, planning and learning environments in a rapidly changing world. He revisits these and adds further insights in a later paper (Delors, 2002). Among the tensions he identifies are several that have deep resonance with communities in Oceania, including the tensions between tradition and modernity, cooperation and competition, the spiritual and the temporal, the universal and the individual, and the local and the global.

In neither of the above documents does Delors elaborate on the idea of tension itself. One assumes he is not using the concept in the sense of conflict between opposing factions or ideologies, the kind of tension that can lead to rivalry and war, but is referring instead to a functional or positive tension. This idea of functional tension is best understood by thinking about the strings of musical instruments. Many people in Oceania play the guitar. They will appreciate that while the instrument is being played, the guitar strings need to be kept in a constant state of tightness if they are to produce pleasing music. One of the tasks of the guitarist is to maintain a functional tension by regularly adjusting and readjusting the strings to ensure accurate pitch and harmony. Likewise educators have the constant challenge of achieving a functional or creative balance between the tensions confronting them as they plan and deliver education.

The concepts of tension and balance are relevant in educational policy and planning, and in curriculum development. Almost every educator I speak with in Oceania believes that the balance is wrong, that the global, the competitive and the temporal have a disproportionate influence in most learning environments. How do we restore the balance? Once again, I find analogy a useful tool. In the realm of visual arts, music, drama and dance in Oceania there are currently some remarkably creative initiatives. Individuals and groups within local communities are creating new forms of expression from the fusion of the

traditional and the modern. The Oceania Centre for Arts and Culture at the University of the South Pacific (USP) Laucala Campus is playing a significant leadership role here.

By way of example, much contemporary music in Oceania represents a dynamic syncretism of the local and the global. It often has equal resonance with those who celebrate and enjoy the traditional as it has for those who prefer modern western music styles. Another wonderful example of the fusion of the global and the local is a fan given to me in Nauru this year. It is very finely woven, using traditional techniques of fan making, and looks exactly like the fans of yesteryear—except for one thing. It is not made with the fibres of young coconut leaves, but woven entirely with vividly coloured, fine plastic string, along with plastic decorations around the edge.

In the realm of education, we should be striving for the same dynamic syncretism between tradition and modernity, the spiritual and the temporal, and the global and the local. This is as true for policy and planning as it is for curriculum or in the classroom itself. Young people need to grow up with the skills and confidence to live successfully in a globalising world. Yet it is becoming increasingly recognised in Oceania that they also need to grow up with a clear sense of their own local cultural identity, built on a strong foundation of their own cultures, languages and spiritualities, and with a deep pride in their own values, traditions and wisdoms.

One of the core principles of the PRIDE Project is a commitment to building the planning and implementation of education on a strong foundation of local cultures and epistemologies. Many educators in Oceania share this commitment, suggesting that the primary goal of education ‘. . . is to ensure that all Pacific students are successful and that they all become fully participating members of their groups, societies and the global community’ (Pene, Taufe’ulungaki & Benson, 2002:3). School and TVET curricula therefore need to be firmly grounded in the local while at the same time achieving an effective syncretism with the global world beyond. How might this be done? Let us suggest a few principles.

- 1) In many settings it may be appropriate to adopt a bilingual or multilingual approach, with English and the local language(s) used equally but separately

in the learning environment. This implies that English literacy and vernacular literacy are equally promoted. A significant challenge here is the development of vernacular literacy materials of standards and interest levels suitable for children and youth of all ages.

2) A culture of literacy has not yet developed in many settings in Oceania. People tend not to read for pleasure and relaxation. Nor is written material a primary source of information gathering: most local knowledge is not stored and transmitted in writing, but continues to rely on oral traditions, with story telling playing a significant role. School and TVET programmes need to recognise, value and build on these oral traditions, yet blend them with modern ways of communicating.

3) Networks of human relationships are profoundly significant in Oceania, especially within the extended family and local language groups. Mutuality, not competition, is all important. This needs to be recognised in all school and TVET learning environments. For teachers, the challenge here is to facilitate strong linkages between and among students, developing learning networks where they can support and learn from each other. Often, group project activity and group assignments can replace individual learning programmes. Peer tutoring also offers significant shared learning opportunities. The ground-breaking 'New Basics' curriculum currently being trialled in Queensland, Singapore and elsewhere provides fascinating examples of a process-based approach that fosters cooperative learning of this kind (see for example, [www.education.qld.gov.au/corporate/newbasics](http://www.education.qld.gov.au/corporate/newbasics)).

### **The four pillars of learning**

One of the most widely recognised and discussed features of the Delors Report is its notion of four pillars of learning: to know, to do, to be and to live together. While it has been criticised by some in Oceania, Thaman (1998), for example, arguing that it leads to the very conceptual fragmentation that the Report itself so strongly criticises, the idea that all learning is built on these four foundations seems readily accepted in most cultures. For example, the design and construction

of many traditional homes and meeting places in Oceania are based on four large timber uprights, usually tree- or palm-trunks, one in each corner, these supporting the remaining structure. The idea that each upright needs to be of similar size or scale in order to ensure structural strength and stability is readily transferred to education, and to the view that all pillars should receive equal emphasis in a child's learning. In reality, however, the representation of each pillar in most education systems in Oceania, as elsewhere, is far from balanced, with 'learning to know' and 'learning to do' occupying disproportionately large parts of the curriculum. As Jacques Delors (2002) himself acknowledges, these two pillars have long been self-evident, and are the dominant focus of most education systems.

The 'learning to be' pillar has posed particular challenges for educators. It is the least understood, and the least represented in curricula at all levels. Even though the idea achieved considerable recognition following publication of the 1972 UNESCO report of the same name (*Learning to be*, or the Faure Report), it had not become prominent in education discourse prior to release of the Delors Report. Basically, it has to do with the formation of identity, both individual and collective, with the achievement of self-knowledge, self-understanding and self-fulfilment (Delors, 2002), and ultimately with the development of wisdom. The full recognition and implementation of 'learning to be' will require '... nothing less than a revolution in education that will be expensive in terms of time' (Delors, 2002:151). Nevertheless, Delors makes it clear that we cannot afford to overlook this aspect of learning, for through it people are empowered to learn about themselves, and to become more fully human.

Likewise the 'learning to live together' pillar challenges those engaged in curriculum reform. The tendency is to relegate it to the Social Sciences, and to the teaching of international relations. Yet one of our primary goals surely is to learn to live together within a nation state. Again, Jacques Delors expresses this aptly:

This newer pillar has a special resonance in the twenty-first century as countries grapple with the difficulties of co-existence among different religious communities, different ethnic groups and others. Education bears a tremendous responsibility to bring to blossom all the seeds within every individual, and to

make communication between people easier. Communication does not simply mean repeating what we have learned: it means also articulating what is in us and has been combined into a rounded whole through education, and understanding others. (2002:151)

In a deeper way these two pillars also have to do with the nurture and development of spirituality, not just in a religious sense, but also through the broader quest for meaning in life and for explanations of reality, both individual and communal. It is interesting that secular education discourse—that of UNESCO and other international agencies, for example—is starting to emphasise the spiritual and to advocate a role for education in the spiritual development of children and youth (see, for example, Zhou & Teasdale, 2004). But how do we introduce the development of the spiritual into school and TVET curricula? Certainly not by creating an extra ‘box’ somewhere, and slotting it in alongside other content areas.

In my view the teaching of spirituality, and more broadly the teaching of ‘learning to be’ and ‘learning to live together’, cannot be superimposed on existing curricula and taught purely as content. The following principles therefore are suggested.

- 1) The teaching of these elements is the responsibility of each and every teacher. They should be woven into the very fabric of the curriculum in *all* subject areas in a fully integrated way.
- 2) They cannot be taught just from a content perspective. Curriculum process is equally important, if not more so (see, for example, Teasdale & Teasdale, 2004).
- 3) Teachers themselves should be exemplars of good living in these areas. Their own behaviour and relationships should inspire and guide students.
- 4) School and college administrators also have significant responsibilities here, in particular for ensuring that the organisation of the institution, and all relationships within it, are exemplary of ‘learning to be’ and ‘learning to live together’.

5) Teacher training institutions need to rethink their curricula, pedagogies, structures and organisational culture to bring about the expected transformation at the learner level. The aim here is to ensure that the pre- and in-service training of teachers effectively incorporate these elements.

From a traditional perspective, these two pillars were, until the colonial era, a fundamental part of a holistic process of lifelong learning throughout Oceania. If we could return by time capsule to the villages of our ancestors, say three hundred years ago, most of us would find that 'learning to be' and 'learning to live together' indeed accounted for at least fifty per cent of the learning experiences of the children and youth as they prepared to take their place in the adult life of the community.

It is to be hoped that global thinking about education may be coming full circle, returning to the subjective and the spiritual, and to a more holistic and lifelong approach, thereby allowing the peoples of Oceania to reaffirm the legitimacy of their own local ways of thinking, knowing and understanding. It thus reinforces the significance of the PRIDE Project objective, namely to expand opportunities for children and youth to acquire the values, knowledge and skills that will enable them to participate actively in the social, spiritual, economic and cultural development of their communities. Certainly if we are to capture the essence of the Delors Report in the development of curricula, ensuring that 'learning to be' and 'learning to live together' occupy at least half of the energies of teachers and students, then we need a radical transformation of the way we conceptualise curriculum content and process, as well as the roles and responsibilities of teachers.

Moving beyond the Delors Report, I now want to conclude this chapter with a brief and very preliminary exploration of philosophical perspectives, including postmodernism, and their implications for the reform of education.

### **Postmodernism and education**

Knowledge, like culture, is in a constant state of flux: it is never static. Presently, in the globalising world, we are going through a particularly significant period in the transformation of knowledge. Because it is happening all around us, it is difficult to understand and describe. There are, though, several things we can say about it.

1) It is a shift from a relatively finite system of knowledge, where we have assumed the world to be basically knowable, to the infinite. The sheer magnitude of the expansion of knowledge in recent years, and the capacity for continuing expansion, is beyond our comprehension. The ease with which we can access most of this knowledge through the world of cyberspace is equally mind-boggling.

2) It is a shift from the certainty and predictability of the old scientific understandings of the past few centuries, to the uncertainties and unpredictabilities of the new sciences of chaos theory, quantum mechanics and so forth. In their writings, the ‘new’ scientists are admitting they do not have answers to our questions about ultimate realities, and they reaffirm the importance of subjective and spiritual explanations of the creation of the world and the meaning of life.

3) It is a shift from neatly packaged and defined areas of knowledge—from clearly demarcated areas of intellectual inquiry—to much more holistic and integrated ways of thinking and knowing that transcend the old boundaries and venture into territory that may be quite new and unfamiliar to us.

4) It is a shift from the security of positivism and structuralism to the insecurities and uncertainties of the poststructural and the postmodern. It is a shift from that which can be known, quantified and explained, to that which is fleeting and often intangible. Instead of searching for the right answers, it encourages us to search for the right questions.

5) And finally, it is a shift from an exclusively western/global discourse to new forms of dialogue between the western and the indigenous. In other words it represents a genuine search for complementarities between the global and the local.

What are the implications of this for educational planning in Oceania? First, we here in Oceania are not alone in our quest for a creative fusion of the local and the global. A recent high-level conference on educational planning at Oxford University, for example, had as its theme, ‘Knowledge, values and policy’, exploring

questions such as the role of spiritual and ethical knowledge in educational planning, and alternative ways of planning in traditional religious cultures.

Secondly, there is an exciting correspondence between postmodernism, the new scientific thinking, and the ways of knowing of many local and indigenous cultures. All three open up different ways of perceiving reality, challenging us to think in terms of:

- interconnectedness rather than fragmentation
- inclusion rather than exclusion
- mutuality rather than hierarchy
- the relativity of knowledge, truth and values rather than certainty and objectivity.

Let me give three examples that are relevant to the planning and implementation of education at all levels.

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1) *The reality of the spiritual.* Most local cultures do not differentiate between the spiritual and the physical. For many cultures the spiritual is a reality that is not queried or challenged, even when dissonance exists. The old western preoccupation with finding the 'right' answer and thus resolving the dissonance does not occur. Likewise in the new sciences the need for closure is less apparent, and the metaphysical is re-emerging in scientific discourse. This suggests that our planning processes are quite legitimate in including local values, ethics and wisdoms, and in taking a more subjective and spiritual approach.

2) *The nature of social relationships.* A primary feature of most local cultures is the intricate network of social and family relationships that helps to ensure the survival of the group through interdependence and cooperation. People do not define themselves in terms of their individuality, but in terms of group affiliation. Basic to their thinking and knowing is mutuality, not separateness. This contrasts with the competitive individualism of the global world. As emphasised earlier in this chapter, we need to rediscover this interconnectedness, and develop curriculum processes that recognise and

affirm our interdependence and mutuality, both in a human context and with the natural world around us.

3) *The unity of knowledge.* The modern, global view of the world has encouraged a fragmented view of the universe, where knowledge is analysed by dividing it into ever smaller units. This has led to the compartmentalisation of knowledge into discrete disciplines, and to reductionist approaches to thinking whereby any phenomenon can be broken down, however artificially, into separate components. Our planning processes and school curricula have far too often suffered this fate.

By contrast, most local cultural groups traditionally have taken a more organic, holistic view of knowledge that emphasises the essential oneness of humanity and nature. An Indigenous Australian colleague, Dr Doug Morgan, a philosopher, describes his people's view of reality as a web, with all elements of place, people, species and events interconnected in a single cosmos. He emphasises that this concept of a united cosmos is dynamic, continually defining and redefining people's relationships with each other, with the land and with the universe (Slade & Morgan, 2000). Similar views of reality are present in most of the cultures of Oceania.

This indigenous perspective is now mirrored to quite a remarkable degree in the recent 'discovery' of interconnectedness by subatomic physicists, and opens up exciting possibilities for restructuring our planning processes and school curricula in more unified and holistic ways (for a more detailed exploration of these ideas refer to Beare & Slaughter, 1993).

## **Conclusion**

In this chapter I have tried to reconceptualise the planning and reform of education in Oceania by reflecting on the ways that people are thinking about education globally. The chapter has drawn on the ideas of a visionary UNESCO Report, *Learning: the treasure within* (Delors, 1996), and on broader philosophical ideas that are influencing the way we think about knowledge and learning.

In quite a fascinating way many of these new ideas and directions have deep resonance with the traditional values, beliefs and lifeways of the cultures of Oceania, thus helping us in our quest to fuse the local and the global in our educational planning, and in the reform of our school curricula.

It also is reassuring to discover that the goals and priorities of the PRIDE Project, as decided by the Ministers for Education of the region and encapsulated in the *Forum Basic Education Action Plan*, are in significant accord with current international theorising about education. Further analysis of these broader global perspectives will continue to add depth and focus to the conceptualisation of the project.

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## 2

# Global perspectives on strategic planning in education

*Eveli Tokai*

Planning allows an organisation to focus its resources more effectively on areas of need. It involves a good understanding of the current situation and a vision of where it wants to be in the future. There are many forms of planning but strategic planning has emerged as the most effective in the modern context. Strategic planning focuses the organisation's attention on its environment, both internal and external, and on its challenges and risks, and provides a framework for guiding its operation in the desired direction over the future.

From its earliest use in business to its more recent role in educational settings, strategic planning is now well entrenched as a feature of government policy in the Pacific region, and in adopting this planning technique, education ministries in the region now follow this worldwide trend.

This chapter provides an overview of global perspectives on strategic planning in education. It begins by defining strategic planning and provides a brief history of the concept. It also compares the business sector, out of which the concept and process of strategic planning were borrowed, with the education sector, before discussing the application of strategic planning in education. The final section identifies features of successful strategic planning.

### **What is strategic planning?**

Definitions of strategic planning are many and varied, and most writers in the field have their own definition of the term. Not surprisingly, then, definitions vary greatly in terms of their level of abstraction, substance and general acceptance (Steiner, 1979).

Strategic planning is a management tool and is used to help an organisation focus its energies to ensure that members of the organisation are working towards the same goals. As Stringer and Uchenick put it, strategic planning:

provides a framework or focal point for all of the organisation's activities uniting hundreds of employees, dozens of departments, and any number of strong-willed managers so they all move in the same direction at the same time and reach the agreed upon goals despite problems and obstacles that arise along the way. (1986, cited in Tokai 1994:14)

Bryson and Alston (1996:3) argue that strategic planning is a 'disciplined effort to produce fundamental decisions and actions that shape and guide what an organisation is, what it does, and why it does it, with a focus on the future'.

Organisations conducting strategic planning typically commit themselves to a formal process in which a group of 'planners' articulates a mission statement; sets goals and objectives; audits the organisation for internal strengths and weaknesses; assesses the external environment for opportunities and threats;<sup>1</sup> evaluates strategic options; and then selects and operationalises an organisational strategy. The basic aim of strategic planning is to link daily organisational decisions with a vision of where the organisation wants to be at some point in the future, usually five years hence.

Strategic planning involves the determination of goals and objectives and the development of strategies to achieve them. It seeks to address the following questions: Where are we now? Where do we want to be? How do we get there? How will we know when we have arrived?

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<sup>1</sup> Such an approach is generally known as a SWOT analysis, since it focuses on strengths, weaknesses, opportunities and threats.

## **History of strategic planning**

The turbulent and competitive environment of past decades has led to a great deal of interest in the importance of strategic planning, which was first introduced in the corporate sector in the mid-1950s. Since then, strategic planning and management have matured and nearly all large companies around the world have adopted some sort of strategic management system.

### **Global perspectives on strategic planning**

Theories on strategic planning developed 20 years ago are out of fashion now. There is no single ‘right way’ to do strategic planning; strategic planning is, and must be, unique to each organisation. There is no particular strategic planning system that every organisation can adopt. Rather, the application of the underlying principles must be designed to fit the unique characteristics of each institution and the diverse personalities of its key decision-makers.

Ginsberg asked what it is about current strategic planning wisdom that makes it so much more valuable than before. In answer to this question, he notes:

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the difference lies in the lack of abstraction, sterility, and top down arrogance of the old model. This means that where once strategic planning was the sole jurisdiction of the company’s senior managers, it is now the responsibility of teams of line and staff members from different disciplines and functions. Changing the process from one that is esoteric to one that is open and inclusive not only involves extended interaction with people within the firm, but also outside of the firm, particularly with respect to key customers and suppliers. (Ginsberg, 1997:125)

What Ginsberg is saying here is that it is essential to consult staff, stakeholders and implementers. These actors need to be involved, and they need to ‘own’ the plan. Then, and only then, will the planning process be a success.

Similarly, Taylor noted that:

In 1994 Henry Mintzberg heralded the fall of strategic planning in its traditional form as a heavy bureaucratic system organized by large planning departments

... In September 1996 *Business Week* reported that strategic planning is back with a vengeance—but with a difference—less bureaucracy, more emphasis on implementation and innovation, fewer staff planners, more involvement of line managers and teams of employees. (1997: 334)

Probably one of the key factors in making strategic planning appealing has been the move from a heavy bureaucratic system to a more streamlined one with an increased focus on consultations, ensuring involvement and ownership, for *all* stakeholders, in both planning and implementation.

In business settings, strategic planning models have been successful in improving both the production processes and the quality of the products, enhancing worker satisfaction and increasing company profit. As a result, smaller companies are following the larger companies. In recent years, because of its demonstrated success, strategic planning has received increasing attention from governments and from the education sector.

Kaufman and Herman (1991: xiii) caution that ‘strategic planning is in danger of becoming just an educational fad’, adding that ‘[s]ome educators have borrowed a page from the industrialists’ book and embrace it—often without a clear idea of what it is, what it should deliver, and how it differs from other types of planning’.

### **Comparing business and educational enterprise**

Before one can determine the applicability of business planning experience to the education enterprise, it is important to examine the similarities and differences between the two sectors, to see whether the transfer of experience is likely to be hindered or facilitated.

#### **Differences between the business and education sectors**

Educational enterprises often have relatively unclear goals, while the business sector usually has a very clear, shared objective, namely to make a profit. Koteen (1989), for instance, indicates that profit indices measure the success of the

business, and business managers can make decisions in terms of earned profit and can read danger signals if profit declines. On the other hand, educational enterprises are ‘human change agents’, and the business of education is teaching and learning.

Another characteristic that differentiates educational institutions from business organisations is their source of income. The business firm seeks its revenue from the sale of goods and services to customers or clients. Thus the profit gained from sales is a measure of the firm’s effectiveness and efficiency (Koteen, 1989). Revenue for the educational enterprise, on the other hand, comes from a variety of sources such as government grants, student fees, grants from sponsoring organisations and alumni contributions. The revenue does not ‘buy’ the product (education); rather it pays the costs of the provision of the service (education).

According to Drucker (1990) educational institutions always have a multitude of constituencies, each with a veto of power. Because institutions depend on the support of their constituencies (teachers, parents, the taxpayers, the community and the students) and cannot take risks with public funds, they typically make short-term plans to enhance their image. On the other hand, business organisations plan with reference to one constituency, the customers, and their satisfaction. Drucker further argues that without customers willing and able to purchase its products, a business cannot survive.

As well, the business enterprise is made up of autonomous divisions, which are free to determine for themselves what they will do, how they will do it and when. They can often make decisions quickly, mobilising and allocating financial and human resources as needed. In contrast, educational institutions tend to be more rigid and hierarchical, which reduces operational flexibility.

### **Similarities between the business and education sectors**

The similarities between business and educational enterprises will determine whether strategic planning models that have been successful in business enterprises are also applicable to the education sector. Some similarities are that enterprises in both sectors:

- have a budget to manage, staff and clients to organise, resources to allocate, funding sources to develop, expenditure to control, and decisions to make in all those areas that will affect their future
- operate in a complex and changing environment that presents threats and opportunities. They have distinct strengths and weaknesses and operate under constraints
- plan to manage fewer resources better—to do more with whatever resources are available to them, not to complain that they can do more only if given more
- aim for quality rather than quantity, and emphasise efficiency and effectiveness, high performance, productivity and providing better services to their clients (Derr & Delong, 1982).

Although there may seem to be more differences than similarities between education and business organisations, in the final analysis strategic planning is applicable to the education sector, as it has issues that could better/should be managed strategically. However, great care must be taken to apply appropriate business planning experience to education (Tokai, 1994).

### **Strategic planning in education**

Whilst various models of the strategic planning process can be found within the professional literature, all have common elements and underlying themes. The initial application of strategic planning was in the business sector and its application is steadily spreading to government sectors, including education. Although such strategic planning models have not been developed uniquely for educational settings, the ones applied in education have been modifications of models and techniques seen to be conducive to success in business enterprises.

In education, wise planners will pay particular attention to demographic changes, shrinking financial support, strengthening the curriculum, retaining effective teachers, utilising computers and other new instructional technologies, and preparing students for the labour market.

**A strategic planning model**

**Figure 2.1** A conceptual strategic planning model for education



The strategic planning model shown in Figure 2.1 can be applied to any educational system. However, some of the processes involved may not be applicable to their individual needs, as these organisations operate in different cultural environments and are managed by people with different management approaches and preferences. Therefore, planning models need to be tailored to suit the unique characteristics of each education system.

The plan's success is dependent upon the actions of key stakeholders. Consequently, it is important to undertake consultations with stakeholders at each phase of the planning cycle. They are more likely to support and contribute to its implementation if they are involved with planning from the earliest stages and believe it will have a positive impact on the organisation.

### **Features of successful strategic planning**

To be successful, strategic planning should include the following features.

- It must lead to action.
- It must build a shared vision that is value-based.
- It is an inclusive, participatory process, in which all staff members take on shared ownership.
- It accepts accountability to the community.
- It is externally focused and sensitive to the organisation's environment.
- It is based on quality data.
- It maintains openness to questioning the status quo.
- It is a key part of effective management.

### **Key factors needed for effective strategic planning**

Five key factors needed for effective strategic planning are outlined below. This list of factors makes no claim to be a comprehensive or definitive list of the important features that must be found in a strategic planning system. The reader may, and probably will, have a different view of the most important elements, in accordance with the conditions in his/her organisation.

1) *Leadership and management.* Successful strategic planning requires strong and personal leadership. According to Stringer and Uchenick (1986:10), there is 'no substitute for the vision, the dynamism, or the energy of the executive who can translate the right strategy into collaborative action'.

2) *Commitment from the top management.* If senior staff do not recognise their responsibility for strategic planning or do not feel committed to doing it well, then planning will not be done at a lower level or will be done poorly.

3) *Climate for planning.* Top management must ensure that the climate for effective planning is established and maintained in the organisation. If nothing is done about developing a proper climate, in many institutions the climate may become hostile and the planning system would then be ineffective.

4) *Participation of people.* Strategic planning must be carried out in a participatory manner from the lowest level of the organisation. For successful implementation, everyone needs to own the plan.

5) *Clear communication to everyone.* The strategic plan should be well communicated to everyone. Everyone should know where the organisation is going, what the priorities are and why. Unless everyone knows where the organisation is going and how it will get there, continuous improvement will remain a dream.

## **Conclusion**

There is no single ‘right way’ to carry out strategic planning: strategic planning is and must be unique in and to each organisation. Strategic planning needs the involvement of people, especially those who will be involved with the implementation. In addition, strategic planning should be a top down, bottom up and horizontal process. It requires commitment from top management. It also requires strong leadership, leaders who can think and act strategically and can clearly communicate the vision, the organisation’s strategies and departmental goals to everyone—staff and stakeholders.

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### 3

## Principles and processes of educational planning in the Pacific

*Priscilla Puamau*

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All educational systems are shaped by their national histories and socio-cultural, political and economic contexts. Thus, the education systems in the Pacific region are manifestations of their colonial histories.

For the 15 participating countries of the PRIDE Project, many of the educational legacies inherited from their colonial past are still apparent despite their political independence. Fiji, for instance, has educational structures modelled on the British system; the Republic of the Marshall Islands (RMI), Palau and the Federated States of Micronesia (FSM) continue to maintain strong links with the United States of America; the Cook Islands, Niue and Tokelau have close ties with New Zealand; while Vanuatu, because of its unique colonial history, faces the challenge of dual anglophone and francophone systems. The curricula, teaching and learning methods, languages of instruction, assessment and evaluation methods, administration and management models, and organisational cultures of schooling in the Pacific continue in hegemonic forms, usually closely resembling those of their former colonial ‘masters’.

This chapter provides an analysis of the educational principles and processes articulated by the 31 key educational planners and data managers who attended the first PRIDE regional workshop. Strongly embedded in the PRIDE Project is the notion of ownership, with the conviction that Ministers for Education and the people of their countries ought to decide for themselves what their priorities and key educational activities should be. The ‘workshop’ concept demonstrated the confidence PRIDE has in the deep insights and vast experience that the participants brought to the workshop. In fact, the workshop privileged their voices by hearing and recording their ‘inside’ expertise, knowledge and values, so that a Pacific body of knowledge and wisdom could be developed on educational strategic planning.

The senior management and education officers at the workshop were given the opportunity to reflect on and interrogate the best ways of merging local and global planning practices to ensure that they developed a clear epistemological foundation for their work. Indirectly, this chapter is in many ways a ‘writing back’ to the colonial histories of Pacific people as they chart their way through their past and present to get the best outcomes for the future development of education in the region. Within the confines of globalisation and the culture of donor assistance, they can ‘rewrite’ their own educational histories and reconstruct their own educational identities and systems.

### **First PRIDE regional workshop**

Coombs (1970: 14) defines educational planning as ‘the application of rational, systematic analysis to the process of educational development with the aim of making education more effective and efficient in responding to the needs and goals of its students and society’. Strategic planning, a concept borrowed from the business world, enables an organisation or educational institution to determine its goals and objectives and to develop strategies for achieving them.

The focus of the first PRIDE regional workshop was strategic planning methodologies for basic education. The 31 participants comprised the National Project Coordinators (NPCs) and data managers from the 15 countries served by the Project. Early in the workshop they were divided into groups and asked to respond in detail to the following questions:

- 1) Please discuss the kinds of planning processes that have been used in your society/culture, or are still being used. What are the underlying values, beliefs, wisdoms and epistemologies that have guided the way your people reflect on the future? How have people planned ahead?
- 2) Please consider how to develop a set of planning principles and processes that blends the best of the global with local Pacific ways of planning for the future.

Towards the end of the workshop they regrouped, and were asked to revisit and review their earlier discussions in light of subsequent presentations and debate.

The challenge for the participants was to develop a set of principles and processes that was firmly grounded in Pacific values and epistemologies, yet was fully syncretised with useful global approaches. In other words, the participants had to provide what they perceived as a good balance of the local Pacific ways of planning with the global.

Another key dimension of the workshop was for participants to review a draft set of 10 benchmarks to see if there was a need to add new ones or remove any, and to prioritise the list. Additionally, and more importantly, the participants were requested to develop specific performance indicators that would be used when applying these benchmarks to a strategic education plan.

What follows is mainly sourced from the records and summaries of the discussions by the participants at the workshop. After discussion of local planning processes, the substantive part of the article focuses on principles of strategic planning. This is followed by an articulation of the benchmarks further developed at the workshop, which will be used by the PRIDE project to review education strategic plans of each participating Ministry of Education (MoE), looking specifically at their performance indicators.

### **Local planning processes**

Strategic planning is not new in the Pacific. From the dawn of human culture until today, in all spheres of life, whether to mark a key milestone in village or individual lives such as a wedding or a funeral, or for survival purposes such as fishing, war

or sea travel, plans had to be laid and strategies developed to ensure that the purpose and goals of the activity were fulfilled.

The example used by one of the groups at the workshop helps to demonstrate the intricate details that go into planning an activity, in this case a national feast to celebrate the installation of a chief. First, a meeting is called where the people of the village attend and the leaders or elders begin discussions by explaining the event to be celebrated, its importance and the need for everyone's cooperation to ensure that all goes well on the day itself. The planning discussions then focus on the delegation of responsibilities such as food preparation, quantity of food needed, division of labour, entertainment and traditional and other obligations. In the lead up to the actual feast, sub-group meetings are held to discuss the finer details such as hunting, fishing, cleaning, decoration, programme and other necessary activities. On the day of the actual feast, all the months of preparation become evident in the great pomp and ceremony with which traditional protocols are strictly observed as the celebrations unfold.

This example demonstrates the communal approach to the planning process. Wide consultations and consensual decision-making take place within a democratic framework, allowing individuals to feel that they are adequately represented at discussion level by either their chief, family leader or representative. Planning is contextual, taking into account the social, economic, political, cultural and spiritual settings in which actions are to be taken. Resources are managed for the benefit of the whole community. Land is the main resource and this is used to meet the needs of the whole group, not for economic gain. There are specific roles for different groups in planning and implementing activities, and good leadership, when demonstrated at all levels, leads to the relative success of the activity. The economic well-being of the community or group is the priority and cultural values are maintained throughout the process of planning and implementation.

The underlying values and beliefs that guide local planning processes include: cooperation; unity; reciprocity; respect for authority, each other and for the environment; maintenance of culture and traditions; maintenance of family and community relationships; sharing and caring; religious or spiritual nurturing; moral and character development; and capacity building. An important focus is on

building a productive and constructive society and maintaining the economic well-being of the community, which are the main goals of many planning activities.

In planning for the future, Pacific communities start with a vision. They set goals, brainstorm and contemplate as well as consult and participate in decision making. Planning may be assigned to appropriate social groups and revolves around available resources. There is a communal understanding of what needs to be done and by whom.

In Pacific societies, acquired knowledge from past experience and previous generations is the knowledge base used when drawing up plans for action. While there is communal consensus of the goal of particular activities, accountability is at an individual level, because of the deep personal commitment to communal tasks. However, because chiefs or traditional leaders are ultimately responsible for the safety and survival of groups, autocratic decision-making does occur at times.

Planning is therefore an essential tool for decision making. Consultation and cooperation are important for the achievement of set goals. Plans are laid according to the scope of resource availability, whether human, financial or material. Goals and objectives are realistic, relevant and achievable. Authority is delegated, and roles and activities are monitored to ensure that societal norms are adhered to. The monitoring of activities is a control mechanism to ensure that there is accountability for both individual and collective contributions. Sustainability of resources and the environment is also an important consideration in traditional planning processes. Moreover, the transfer of skills and knowledge from one generation to the next is inbuilt into the system: taking part in the activities, under the guidance of their elders, is the way the young people learn.

#### **Principles and processes of planning: blending the local and global**

There was consensus amongst workshop participants on the need for the development and establishment of a Pacific body of knowledge, not only on educational planning, but on every aspect of education. To achieve this, a collective interrogation and analytic process needs to take place of strengths and weaknesses of each educational system, to build on strengths without compromising or

neglecting culture and tradition, and to ‘borrow’ best practices that work in other places. The participants acknowledged the need to meld local and global practices that work.

### **Processes of strategic planning**

There is no such thing as a perfect plan and therefore no right way or wrong way of writing a plan. However, planning should be localised and contextualised so that it reflects the needs, values and cultures of each country. ‘Our way’ of planning may be the best way of proceeding and each country must develop its own strategic plan according to its unique characteristics and priorities. The global perspective therefore should not overwhelm the local Pacific perspective.

Contemporary global processes of strategic planning are adequately covered in chapters 2, 4 and 5 of this volume so they will not be covered in any detail in this chapter. Generally, the planning process begins with aspirations of the people and the Minister or Ministry of Education, which are translated into a vision and mission. Goals, objectives and outcomes are then articulated. Strategies for achieving these are formulated and performance indicators for their achievement are identified. Timelines, resources and people responsible for various activities and programmes are identified before the plan is formalised. The plan is then communicated to the various stakeholders for awareness. It is then implemented, monitored, reviewed and evaluated against performance indicators and achievement of anticipated outcomes.

Consultations should take place at every stage of the planning process, with monitoring, evaluation and review taking place at regular intervals. Research and analysis of issues are constantly undertaken at every stage. It is also important to draw up contingency plans as part of the planning process.

### **Principles of planning**

To recapitulate, workshop participants identified the following cultural values as underpinning local or traditional planning processes: respect for authority (elders and chiefs), one another and the environment; reciprocity; cooperation; sharing and caring; spirituality; moral or character development; maintenance of

relationships; exemplary leadership; capacity building; and sustainability of the environment. The challenge for Pacific people is how to ensure that these values are transferred or worked into current planning processes and structures to ensure that local or traditional values that have stood the test of time actually underpin modern Pacific organisations and institutions. (Discussion on cultural values and the disharmony that can develop between these values and those of educational organisations is articulated in chapter 9.)

After considerable discussion by participants at the workshop, the following 12 principles were identified as important considerations that should underpin educational planning in the Pacific.

### **1. Strong, objective and visionary leadership**

There is a clear understanding that strong and visionary leadership is necessary in every sphere: families, villages, schools, Ministries of Education, church organisations, and teacher training institutions (whether government or the private sector). Part of good leadership is the shaping of a vision for the organisation, with its concomitant mission and strategies for the achievement of its goals and objectives. Strong leadership and good governance (economic, social and political) are essential for the development and implementation of ‘good’ strategic plans.

The vision and mission must be clear and achievable. In the case of the MoE, it is crucial that the vision and mission statements are clearly articulated and communicated to education stakeholders, including MoE staff and schools. For educational institutions such as schools and teacher training institutions, their own vision and mission need to be communicated within the organisation to facilitate a more effective implementation of the plan.

### **2. Participatory and consultative approaches**

In developing a strategic plan, wide consultations need to take place with stakeholders to ensure that there is a more holistic participation in the planning process. The participation of civil society organisations is particularly important, to ensure that the consultation process is inclusive, as are the views of stakeholders in the school system, such as principals, teachers, parents and students. Community

leaders also need to be consulted. Other stakeholders who have an interest in education, such as employers, politicians, MoE personnel and other government ministries, should also be consulted.

Information should be given in a language and manner that makes people feel valued and respected. The process of consultation should involve planners going back time and again to check and re-check for accurate representation of ideas, as well as giving feedback on how ideas have or have not been included in the plan and the reasons why. There should also be the awareness that people might feel ‘over-consulted’ and may give responses that they think the planners want to hear, and not necessarily what they believe or think should be in place.

A communication strategy should be developed by the MoE for different levels: national, provincial, village and school. The objective is to build stakeholder awareness about the provision of education in different formal and non-formal sectors; to provide a forum for discussion and debate about vocational and academic education; and to inform parents, the business sector and civil society about future educational requirements to keep pace with national and international employment needs. When communication channels are kept open between the MoE and its stakeholders, democratic participation in educational processes, including the development of a strategic plan, will be considerably easier and more manageable.

There are several issues of concern regarding the consultation process. First, donor-driven consultations are counterproductive to the notion of local ownership. ‘External’ or foreign ideologies, values and epistemologies become the driving force behind the consultations, and the processes and outcomes could exclude local aspirations, values and priorities. There is therefore the danger that no ‘real’ consultation takes place and there is little or no sense of local ownership. Secondly, the MoE needs to take great care in the selection of stakeholders, to ensure that there is wide representation of a cross-section of the community. There is otherwise a risk when MoE officials select the stakeholders that some key civil society organisations might be excluded.

Moreover, horizontal and vertical consultation needs to take place among the ranks of MoE staff, particularly those of middle-level management, to strengthen

their sense of ownership, since in many cases it is they who will implement many of the activities on the plan. Teachers and school heads should also be consulted, as well as staff of teacher training institutions, since they are the implementers of many educational reforms that take place at classroom or school level. A serious limitation of many planning processes at the MoE level is the exclusion of stakeholders from the preliminary stages. In all too many cases, stakeholders are only ‘consulted’ after the fact, when a lot of work has already gone into the planning stage and they are presented with the result. They are, in this case, expected to give ‘rubber stamp’ approval of the end product after having been neglected in participating meaningfully in matters of national importance.

### **3. Localising ownership**

The ownership principle is important in the development of strategic plans. Ownership must be at all levels: within the MoE, in the schools and in the community. It is at the point of the MoE in particular that it should be capitalised on. Professional and administrative staff need to have a clear sense of owning the plan. Otherwise their commitment and zeal for its implementation may not be strong. Participation in and ownership of the planning process are important for the success of strategic plan implementation. Currently, in many MoEs there is too little involvement of lower and middle managers in strategic plan formulation.

When outside donor funding is available, there is a tendency for the strategic plan to be developed by outside consultants. This can lead to implementation being problematic—understandably, given that local ownership of the plan is not encouraged during the whole process leading up to the finalisation of the plan. Local professionals utilised by the foreign consultancy firm have their brains picked but they are not necessarily—indeed, often almost certainly not—involved in any meaningful way in the process of strategic plan development. Capacity building for local counterparts is usually not part of the mandate of the consultant. Instead, the main aim is to get the consultant’s report and annual plan prepared in written form for handing over by a particular deadline already decided upon prior to the commencement of the planning consultancy. The MoE is then left to pick up the pieces after the consultant has left.

Often there is a beautiful plan in place without appropriate resources available for its implementation. If there are resources available, there might not be commitment or dedication on the part of the implementers, because they were not meaningfully involved in the drawing up of the strategic plan in the first place.

#### **4. Realistic, achievable and affordable plans**

It is important that strategic plans are realistic and achievable in terms of goals, objectives, the performance indicators used to measure results, the time frame and the outcomes. The activities also need to be costed and prioritised, to ensure that they are planned for in the budgetary cycle. No matter how ‘perfect’ the plan might be, if government is not committed to funding the priorities, then implementation of the plan can be problematic.

Sustainability of activities in the plan needs careful consideration. If a new long-term programme is planned for in a particular planning cycle, its recurrent and associated costs in the next planning cycle need also to be borne in mind, particularly if it is an expensive initiative. At all times, the MoE must work within its means and must also make optimal use of external donor assistance. MoEs must be cost effective in their operations.

Since donor assistance to educational systems is available in virtually all 15 participating countries, a question that needs to be considered honestly is whether countries are complying with donor agencies *to meet education goals and priorities*, or whether they are only interested in getting financial assistance for the sake of getting financial assistance.

Undue influence from educational aid donors should be particularly resisted because the principle of local ownership is crucial in strategic planning. Since priorities are articulated in these plans, they should be the result of reflection and consultations by the local community, and by both civil society and educational professionals. Chief Executive Officers and Ministers of Education should be cautious about who actually drives the formulation of priorities and strategies of national educational plans. While any external assistance from donor countries is appreciated, the chief executives and senior staff of each MoE should

remember that ultimately, the plan must be implemented, and if it is localised and contextualised from the start, the greater will be the chances of successful implementation.

### **5. Valid, reliable data**

The production, utilisation and dissemination of information relevant to policy makers and decision-makers play a key role in planning (Caillods, 1991). The focus for data managers who attended the first regional workshop in Lautoka was the crucial place in the planning process of valid and reliable data, and chapters 6 and 7 of this volume address that question. In recognition of the importance of good data in educational planning, there is a real necessity to increase or improve data management capability in the education sector.

In the small to medium sized countries of the Pacific, limited staff numbers mean that there may not be a planning unit or a computerised data management system in place; and if there is one, it may be under-resourced and face severe constraints on its ability to produce, analyse and disseminate data when needed. Similarly, the planner for the MoE may not be a specific person, but an individual who has planning added to the myriad responsibilities he/she already has to undertake. As a consequence, planning may not be carried out effectively.

In the Pacific, because of the influence and impact of donor assistance to the education sector, strategic planning has become fashionable. For example, with assistance from AusAID, Fiji was able to develop its first strategic plan, for 2000–2002. Similarly, the ADB assisted the MoE in the Marshall Islands to develop a strategic plan in 2000, for an indeterminate period of time. Ministries of Education in other Pacific countries have had to wake up to the fact that if they did not develop a strategic plan, they were likely to lose out on donor educational aid. This is particularly so in the operation of the PRIDE Project, which strongly emphasises the development of education strategic plans as a prerequisite for the provision of any assistance for the implementation of some of the priorities of the education sector.

Given the key focus on strategic planning, there is no escaping the fact that if good decision making and policy formulation are to take place, educational

planners and data managers need up-skilling and specific training in order to provide optimum service. Far too often, because of the constraints mentioned, planners and data managers are thrown into the job and have to sink or swim. More often than not, they have many other responsibilities to carry out and are therefore not in a position to do justice to their work.

If MoEs are to function more effectively and efficiently, then they will have to give serious consideration to strengthening their planning units and information management systems. These two go hand in hand. However, the danger that planners trained in western universities may perpetuate global systems, to the detriment of local ways of knowing and doing things, must be recognised. This ‘squeezing out’ or ignoring may happen unintentionally: planners must be particularly sensitive to different viewpoints, including respect for local traditions and cultures.

#### **6. National, regional and international alignment of plan**

It is important for the education strategic plan to be aligned to national priorities and the needs of the nation. To a lesser extent, but just as importantly, the MoE strategic plan should be aligned to regional and international conventions such as the *Forum Basic Educational Action Plan (FBEAP)* and UNESCO’s *Education for All (EFA)*.

Aligning the education strategic plan to the overall national strategic plan is of particular importance, since implementation of many projects and programmes will depend on the release of available funds from the national treasury. Government will fund those activities that have been identified as priorities in its overall strategic development plan. Of relevance here is the need for effective consultation and coordination between the MoE of each country and the Ministry of National Planning as well as the Ministry of Finance. The reality is that strategic plans will be more successfully implemented if appropriate funding is available.

#### **7. Training and capacity building**

There is ample evidence to show that training does improve the ability of individuals to plan more effectively. In particular, those personnel who have training in

planning or have worked with donor funded projects have gained relevant skills and knowledge that can be transferred to the local context. For instance, they have developed such skills in planning, monitoring and evaluation as problem solving, data collection, and writing statistical reports and other formal planning documents. There is, however, an urgent need to provide further capacity building in policy development, data management and strategic planning. The same emphasis that is given to teacher training should be given to training in these areas.

This is an important area that is often neglected by MoEs. In many cases, planners and data managers are thrown into their positions without having had, or subsequently had opportunity to undertake, the appropriate training for optimum performance. In these cases, the MoE may not have the expertise needed for the best decision or policy option to be taken, inevitably resulting in poor planning and implementation: planners and data managers must be appropriately trained and skilled in the ins and outs of their profession.

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### **8. Flexibility**

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It was recognised that plans should never be set in concrete. They need to be flexible in order to adapt to changing circumstances. If a plan is borrowed from another system, it must be adapted or modified to suit the needs of the borrowing country. Since plans are living documents, they can be modified to address changing economic, technological or political circumstances.

One of the 12 planning principles articulated in the Education Policy Paper developed as part of the Tonga Education Strategy Planning Project (Catherwood, Levine & Moeaki, 2003: 12) is summed up in this way: 'The Strategic Plan for Education should be dynamic, developed on a rolling basis, capable of modification in the light of unanticipated events, and monitored on a regular basis'. This best expresses what flexibility meant to the participants of the workshop.

### **9. Monitoring and evaluation**

Once a strategic plan is developed, it is important to have a monitoring system in place to measure the achievement or otherwise of key performance indicators,

to see if strategies have been implemented and whether outcomes have been achieved.

The plan needs to be monitored regularly during the implementation phase and refined according to the economic, social and political realities of the day. To ensure that accountability measures are not neglected, it is desirable to have built into the plan a mechanism for regular review of the progress of implementation.

### **10. Cultural considerations**

There was strong consensus at the workshop that local cultures and traditions should not be neglected or ignored in the process of strategic planning. While global ways of knowing are important, they should not subsume or overwhelm local cultural values, epistemologies and wisdom. Pride in cultural and national identity was identified and prioritised as a key benchmark for the review of education strategic plans (PRIDE, 2004). In particular, this benchmark emphasises the point that the strategic plan should be built on a ‘strong foundation of local cultures and languages, thus enabling students to develop a deep pride in their own values, traditions and wisdoms, and a clear sense of their own local cultural identity, as well as their identity as citizens of the nation’.

This vision is strongly articulated in an important publication called *Tree of Opportunity: Re-thinking Pacific Education* (Pene, Taufe‘ulungaki & Benson, 2002) which recommends that education be firmly rooted in the cultures of Pacific societies—processes and skills, knowledge, arts and crafts, institutions, languages, values, beliefs, histories and worldviews. Drawing on its cultural roots, Pacific education should grow strong and healthy while permitting the grafting of foreign or external elements without changing its identity. The main purpose for education then should be:

the survival, transformation and sustainability of Pacific peoples and societies, with its outcomes measured in terms of performance and appropriate behaviour in the multiple contexts in which they have to live. The primary goal of education, therefore, is to ensure that all Pacific students are successful and that they all become fully participating members of their groups, societies and the global community. (Pene, Taufe‘ulungaki & Benson, 2002: 3)

### **11. Balance in curriculum and levels**

The primary focus of any education strategic plan is to enhance the quality of teaching and learning in schools, particularly the learning outcomes of students. This important fact may be overlooked when it comes down to the nitty gritty development of national educational strategic and annual plans. Related to this is the need to ensure that students are given a balanced education that will prepare them with skills for life and work in a global world, this being another benchmark that will be used to review education strategic plans of participating countries in the PRIDE Project.

This benchmark clearly stipulates that the strategic plan should address the challenges of articulation between each level of education (preschool, early childhood, primary, secondary, technical and vocational education and training). As well, the plan should address the challenges of articulation between education and the world of work, not only in the context of paid employment but also of self sufficiency, self reliance and self employment. Further, the plan should demonstrate effective articulation between formal and non-formal education.

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Catherwood, Levine and Moeaki (2003: 12) have included the principle of balance as critical in the strategic plan for education in Tonga. They describe it this way: The strategic plan for education should be balanced, in terms of appropriate:

- weight for each education sector (pre-school, primary, secondary and tertiary)
- emphasis on maintaining its core business and making any necessary changes to improve performance
- regard for traditional values of Tongan society and the new values of the modern world needed by Tonga for future success
- emphasis on achieving academic excellence, while also recognising the necessity to develop the skills that the economy needs.

Another dimension to the issue of balance in the curriculum is to ensure that students are prepared with skills for life and work in a global world. This is yet another important benchmark for effective strategic planning. The principle of this benchmark states that the plan should contain strategies for the systematic teaching of literacy, numerary, ICT and English skills, together with life and work

preparation skills, thereby equipping all students to take their place in a global world with ease and confidence.

## **12. Access and equity**

Again, the document produced for the Tongan strategic plan is useful here as an example of the use of this principle in strategic planning. This is defined (Catherwood, Levine & Moeaki, 2003: 12) as the design of key priorities to meet fairness and equity objectives through:

- ensuring that the disadvantaged are given fair opportunities to gain access to a quality education
- targeting support if necessary to those in most need
- distributing resources for education in an equitable way
- providing every Tongan with an equal opportunity for a good education.

Similarly, a benchmark for reviewing national strategic plans requires that the plan contain strategies for the teaching of vulnerable students, including those from low socio-economic urban groups, those in remote and isolated areas, those with disabilities, female students, school drop-outs and push-outs, and students from cultural and religious minority groups.

## **Benchmarks for review of strategic plans**

Finalising the benchmarks that will be used by the PRIDE Project to review national strategic plans was another important outcome of the first regional workshop. These ten benchmarks were subsequently ratified at the Project Steering Committee meeting held in October 2004. They resonate with the principles of planning discussed in the previous section and include:

- pride in cultural and national identity
- skills for life and work in a global world
- alignment with national development plans and regional and international conventions
- access and equity for students with special needs

- partnerships with communities and stakeholders
- a holistic approach to basic education
- realistic financial costing
- use of data in educational planning
- effective capacity building for all education personnel
- a framework for monitoring and evaluation.

These principles and benchmarks therefore are recommended as a guide for the development of national strategic plans of the 15 participating countries of the PRIDE Project.

The first benchmark, relating to pride in cultural and national identity, was prioritised by the participants as the most important. The main principle behind this benchmark is that each strategic plan should build on a strong foundation of local cultures and languages, thus enabling students to develop a deep pride in their own values, traditions and wisdoms, and a clear sense of their own local cultural identity, as well as their identity as citizens of the nation. Specific indicators for this benchmark include: a statement demonstrating the development of a national language policy, including the vernacular language(s); a statement showing development of policies or regulations on citizen-building activities such as students learning the National Anthem; and a specific objective or strategy referring to the teaching of local languages and cultures in schools.

Prioritised in second place is the benchmark on skills for life and work in a global world. This is based on the principle that national strategic plans should contain strategies for the systemic teaching of literacy, numeracy, ICT and English language, together with life and work preparation skills, thereby equipping all students to take their place in a global world with ease and confidence. Two performance indicators include clear statements of curriculum outcomes in the teaching of literacy, numeracy, ICT and English language across all levels, and a clear statement on strategies for the development of life and work preparation skills, including technical and vocational education and training (TVET).

The third important benchmark identified by the workshop participants concerns aligning education strategic plans with national development plans and regional or international conventions. It is particularly important for indicators to show evidence of dovetailing objectives and strategies with the most current National Development Plan. Additionally, the education strategic plan ought to contain a statement of commitment to regional conventions such as the *Forum Basic Education Action Plan (FBEAP)* as well as to international conventions such as the UNESCO *Education for All (EFA)* initiative.

The fourth benchmark of access and equity for students with special needs rests on the principle that the education strategic plan should contain strategies that address the needs of vulnerable students, including those from low socio-economic urban groups, those in remote and isolated areas, those with disabilities, female students and school drop-outs and push-outs. This ought to be manifested by way of a specific objective in the plan referring to meeting the needs of these categories of students in order to provide them with equality of access and opportunity. Another performance indicator would be the inclusion of a clear statement of strategies to improve educational opportunities for vulnerable students through more effective teacher training, and through improvement of infrastructure, resourcing and programmes. Equally importantly, there should be an indicator regarding the existence or development of appropriate policies or legislation in the area of special education.

The fifth benchmark is in the area of partnerships with communities and stakeholders. The education strategic plan should show clear evidence that it was developed using consultative and participatory processes in the broader context of civil society, including parents, students, private providers of education, NGOs, employers and other community and private sector groups. Indicators need to be inclusive of strategies outlining consultative meetings with key stakeholder groups and community leaders, and strategies outlining participation of stakeholders and the community in education policy development.

A holistic approach to basic education is the sixth benchmark that will be used to review education strategic plans. There are three components to this benchmark. First, the education plan should address the challenges of effective articulation

between each level of education; from pre-school or early childhood to elementary or primary, from primary to secondary, and from secondary to TVET. Secondly, the plan should address the challenges of articulation between education and the world of work, not only in the context of paid employment but also of self-sufficiency, self-reliance and self-employment. Thirdly, the plan should demonstrate effective articulation between formal and non-formal education. Performance indicators for this benchmark include the following:

- a written curriculum framework stating the linkages between early childhood and primary sectors, between the primary and secondary sectors, and between the secondary and post-secondary sectors
- TVET oriented programmes included as part of the school curriculum
- an adequate supply of appropriately qualified and trained teachers available for different school levels
- pathways between school and post-school clearly articulated through programmes and a quality communication strategy
- provision in the national curriculum for education from early childhood to secondary that can be used in the formal and non-formal sectors.

The seventh benchmark concerns realistic financial costing. The education strategic plan needs to be carefully costed, and realistic in terms of current and projected levels of national budgets and donor funding for the education sector. Indicators should include evidence of robust budget preparation and evidence of an efficient financial management system in place.

The use of data in educational planning is the eighth benchmark identified as important to assess national education strategic plans. The principle for this benchmark is that the education plan should be based on recent educational data that have been systematically collected, analysed, managed and reported. Performance indicators include evidence of a trained data management officer or unit and the existence of an Education Management Information System (EMIS).

Effective capacity building for all education personnel is the ninth benchmark. It deals with whether the implications of the education plan for the training of

education personnel are addressed and the development of effective training strategies, particularly in the following four areas: the pre- and in-service education of teachers; educational leadership, with a focus on ensuring that staff are conversant with and committed to the strategic plan; educational planning; and data management. Three specific performance indicators to demonstrate evidence of adherence to this benchmark include: indication of levels and numbers of education personnel to be trained, clear strategies on both pre- and in-service teacher training, and evidence of capacity building programmes in place.

The final benchmark is the inclusion of a framework in the education strategic plan that will be used for monitoring and evaluating. In particular, the plan should contain a framework that allows outcomes-based judgements to be made about the effectiveness of education provisions at all levels, and in all areas of the curriculum. Performance indicators ought to include evidence of the following: a national framework to assess student achievement; a performance management system for staff; and a reporting mechanism on the success of otherwise of strategies in the plan.

## **Conclusion**

In this chapter, I have articulated the voices of planners and data managers from the participating countries of the PRIDE Project at its first regional workshop on principles of strategic planning. Additionally, I have discussed the 10 benchmarks developed at this workshop, which will guide the review of MoE strategic plans.

The set of 12 principles of strategic planning developed in the chapter strongly suggests that success in blending local Pacific ways of knowing with global approaches is possible. The significance of this is the establishment of a distinct Pacific body of knowledge on educational strategic planning, developed by Pacific Islanders for Pacific Islanders.

The convergence of what can sometimes be regarded as two antithetical positions such as the local and global has resulted in the syncretisation of what is best from both ways of knowing. A critical thread emerging from the issues discussed in this chapter is that global ways of thinking and doing should not overwhelm

the local and that cultural considerations should not be neglected but foregrounded in all educational discussions, not just in strategic planning. Local cultural values and ways of knowing and doing should form an integral part of strategic planning processes. As the participants pointed out, strategic planning is not new in the Pacific—our forefathers practised and lived it, as also does the current generation, in traditional and modern settings. It is when we can analytically interrogate the structures and processes inherited as a legacy of our colonial pasts and the current impact of globalisation that we can develop the best of local and global practices.

It is therefore imperative that this collective process of critically analysing the strengths and weaknesses of our educational systems should continue to build on strengths without compromising local culture and ways of doing, and where appropriate and likely to be beneficial, to ‘borrow’ best practices that work in other places.



## 4

# **The development of Fiji's three-year strategic plans for education**

### **a case study**

*Epeli Tokai*

This chapter provides a case study of how Fiji's Ministry of Education (MoE) developed two consecutive three-year strategic plans, the first for 2000–2002 and the current one for 2003–2005, for the development of the nation's education. It begins with background details on the development in 1997 of a Planning Unit in the ministry and the responsibilities of the unit. It then outlines how a long-term twenty-year plan was developed from which strategic plans were to be derived. However, because a national election held under a new Constitution brought about a pronounced change in government in 1999, the twenty-year plan was shelved, while an Education Commission was formed and carried out its work. The chapter then analyses the strategic planning process in more depth and detail.

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### **Background**

Educational planning in MoE has been an ongoing process. However, prior to 2002 the process was not carried out in a coordinated way, as each department or section continued to develop its own plans separately. It was not until 1997 that a post of Senior Education Officer (SEO) Planning was established within the ministry. The appointee worked in the Research and Development Section (RDS)

which comprised the Statistics, Research, Development and Fijian Education units. The addition of the Planning Unit aimed to strengthen the RDS and to ensure that planning within the ministry was done in a coordinated way.

The SEO Planning is responsible for the overall process of educational planning within MoE. S/He carries out project planning, budgeting, and national and sub-national planning, and derives policy options based on data analysis and research. However, because of the lack of institutional capacity within MoE, the planner is also required to do additional duties as required by the head of RDS.

In 1999, with the assistance of an Australian consultant, the MoE's long-term plan, Education Fiji 2020, was developed. This long-term plan, which coordinated the activities of all departments, sections and units of the ministry, was the first such plan ever developed for the education sector.

#### **How was Education Fiji 2020 developed?**

The report Education Fiji 2020 (MoE, 1999a) was developed to give a clear focus and direction for education in the Fiji Islands. It was a blueprint to promote the very best education for the children and youth of Fiji and to help create a more forward-looking and productive society. It contains a public statement of the ministry's purpose, direction and long-term educational goals, and provides a twenty-year framework for educational planning at all levels. It was developed to ensure that Fiji's education system was responsive socially, culturally and economically to the rapidly changing needs of the Fiji Islands.

This education plan was developed from an analysis of the existing strengths and weaknesses of, opportunities for and threats to Fiji's education system. An analysis of the implications of all other government policies and plans was carried out, to ensure the planning was done within the ambit of existing government policies. Moreover, an analysis of international issues and directions in education was also carried out to ensure the plan was aligned with international conventions and recommendations on education such as UNESCO's *Education for All (EFA)* and its *Learning: the treasure within* (widely referred to as the Delors Report) (Delors 1996).

An extensive consultation process, including consultations with community and interest groups, was carried out across the ministry's four divisions and nine districts, to determine the required and preferred directions for education. This was done to ensure the participation of all education partners in the development of this long-term plan, so that they could share in the sense of ownership of the planning process.

Education Fiji 2020 sets out the objectives and proposed outcomes of Fiji's educational development over a period of twenty years. The objectives provide a focus for the major activity areas in education and the outcomes describe the desired results by the year 2020, providing a reference point against which the education sector would be able to measure its success.

The document does *not* include strategies and performance indicators. Rather, these were to be included in each of the three-year strategic plans the ministry intended to develop as a series covering the twenty-year life span of Education Fiji 2020.

However, the new government that came into office in 1999 decided to do away with Education Fiji 2020, instituting instead an Education Commission. The report of the Fiji Islands Education Commission/Panel, entitled *Learning together: directions for education in the Fiji Islands*, was finally completed in 2000 (GoF 2000), despite the political upheavals in the middle of that year, and became a key document influencing the development of the current 2003–2005 strategic plan.

### **The strategic planning process**

As noted already, two education sector strategic plans were developed within this framework, for 2000–2002 and 2003–2005 respectively.

The first of these strategic plans, a three-year mid-range plan for renewal and development of the education sector, was intended to support the achievement of the priority objectives and planned outcomes outlined in Education Fiji 2020. It provided direction and guidance to MoE partners on priorities for action in education over the subsequent three years (MoE, 1999b). In other words, it was aligned to the 2020 document and covered the period 2000–2002, documenting

the implementation plan for the first three years of Education Fiji 2020 and seeking to put it into action. It was developed from:

- an analysis of strategies required to achieve the outcomes specified in Education Fiji 2020
- consultation with community and interest groups
- consultation at school, district and divisional levels to determine the most pressing requirements and priorities
- an analysis of the implications of other government policies, including the government's *Strategic plan for the sustainable development of the Fiji Islands*.

The Chaudhry Government shelved the 2020 document in 1999, and after the expiry of the 2000–2002 strategic plan, the MoE embarked on the development of the current strategic plan, covering the period 2003–2005. During the initial stages the ministry found that many of its planning documents had already gone through extensive consultation with stakeholders and the community at large. In addition, the government also had some documents highlighting the MoE as implementing agency for some activities. All of these documents together were influential in the development of the strategic plan. The MoE planning documents included:

- Fiji Islands Education Commission Report/Panel, *Learning together: directions for education in the Fiji Islands* (GoF 2000)
- Action Plan on the Implementation of the Fiji Islands Education Commission Report/Panel (MoE, 2000a)
- Blueprint for Affirmative Action on Fijian Education 2001–2010
- Action Plans on the Implementation of the Social Justice Act, 2001
- Education for All Action Plan (MoE, 2000b)
- Review of the 2000–2002 Strategic Plan (MoE, 2002b).

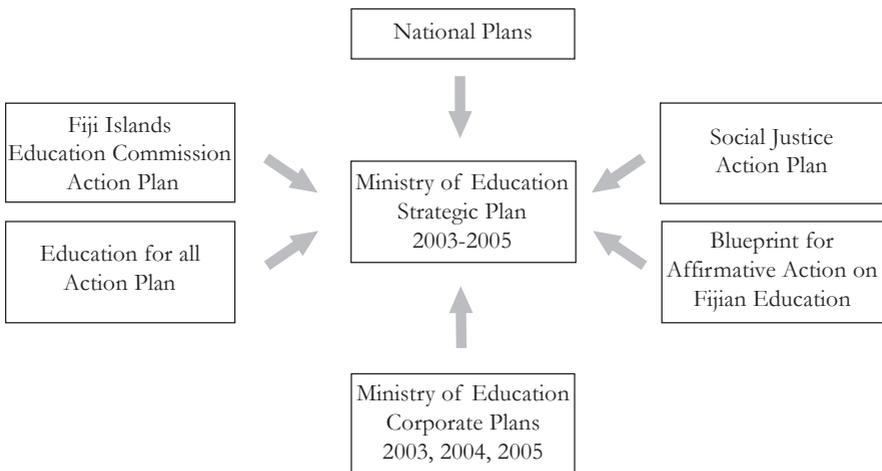
In recognition that MoE works within and serves the interests of the national context, the ministry also aligned its strategic plan with several important government documents, including:

- The *National Strategic Development Plan 2003–2005* (GoF, 2002a)
- The *Twenty-Year Development Plan for the Enhancement of Fijians and Rotumans: 50/50 by the Year 2020* (GoF, 2002b)
- The *Social Justice Act, 2001*. (see Government of Fiji, 2002c)

A consultation process across all sections of the MoE identified priority areas for 2003–2005. During the consultation, each section was asked also to look at all the existing MoE planning documents and to identify possible priority areas for them.

After the consultation, the Planning Unit was given the task of developing the strategic plan. The draft plan was again circulated to all sections for further comments. Further revisions were made to the document before it was tabled in a workshop organised for 35 senior MoE staff in October 2002. To demonstrate the importance of the task, the workshop was organised at an out-of-town venue, thus ensuring that senior staff were not distracted by other office work and could focus their attention on the task at hand. Figure 1 provides an illustration of the process involved in putting together the Ministry’s strategic plan for 2003–2005.

**Figure 4.1 The Planning Process**



As has been stressed, regular consultation was carried out throughout the planning process.

**Conclusion**

The education sector strategic plan for 2003–2005 (MoE 2002a) was put together by the staff of the MoE, without assistance from donor agencies in terms of funding or technical assistance. The exercise was seen as a good opportunity to utilise expertise within the ministry and to ensure that the staff took ownership of the plan.

Doing the planning in this way was a deliberate choice, a demonstration that there is no single ‘right’ way to develop a strategic plan. Each ministry can, perhaps best, tailor strategic planning models to suit the unique characteristics of their organisation. A step-by-step process was not required here as the ministry had planning documents already in place that influenced the development of the 2003–2005 Strategic Plan. Ignoring these and going over the ground again would have been wasteful of resources.

The consultation across all levels of the ministry ensured staff and stakeholder involvement in the planning process. This is highly important, as the recognition of staff and the valuing of their contributions ensures that they will have a strong sense of ownership of the plan, particularly important when they are the ones who will be involved with its implementation.

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## 5

# **Provincial-level educational planning in Papua New Guinea practices, experiences and lessons**

*Uke Kombra*

Educational planning is a management process that measurably and continuously moves an educational organisation towards its ultimate vision. Papua New Guinea's vision for education is 'to prepare and develop a literate, educated and skilled person' through planning and implementing the current education reform policies. However, global and internal changes in politics, economics, social life and techno-information, together with limitations in resources, inevitably affect the ability of education planning to achieve its vision. The planning processes that Papua New Guinea (PNG) provinces adopt and apply are crucial, as ultimately, they affect the national vision.

This case study is based on material from a Master of Educational Administration thesis (Kombra, 2003) investigating the effectiveness of provincial-level education planning in Papua New Guinea in terms of its capacity to facilitate the strategic national education reforms that commenced in 1993. The ultimate purpose of the study was to identify the planning processes practised in the provinces and to assess how well the planning tasks were carried out. In terms of methodology, a triangulation approach was adopted through the use of a survey questionnaire, semi-structured interviews and documentary analysis. The informants in the study were education planners and advisers in the Department of Education (DoE). An eight-phase educational planning analytical framework was used to analyse systematically the educational planning practices of the provinces.

## **Research questions**

The key questions that guided the research were:

1. What are the education planning practices in the provinces and how are these tasks carried out?
2. What practices that enhance and sustain education planning are evident in a province's education planning process?
3. What practices that inhibit education planning are evident in a province's education planning process?
4. How could provincial-level education planning for the implementation of education reforms in PNG be improved?

## **Findings**

The main findings were presented by revisiting and addressing the themes of the four research questions. Question 1 was addressed with a broad overview pulling together data and material from the various aspects of the study. Questions 2 and 3 were addressed within the context of the analytical framework. Question 4 was answered by highlighting the weaknesses and possible actions that could be taken to improve education planning—in other words, recommendations for future action were made.

### *Research Question 1*

*What are the education planning practices in the provinces and how are these tasks carried out?*

Findings indicate that education planning is an important management task of provincial education divisions. All provinces that have developed long-term education plans demonstrate this. Data do not indicate any apparent consistency in planning across the provinces. Nor is it clear that they use any contemporary planning models or practices. Most provinces merely follow the National Education Plan model, which in essence is an integration of different models.

Scrutiny of the data related to the 52 strategic planning tasks contained in the analytical framework indicates that provinces knowingly or by default performed strategic planning tasks. However, prevalent inconsistency existed in the efficiency of task execution, as demonstrated by significant variations within provinces, and between provinces and regions of the country.

Table 5.1 provides a summary of planning tasks and identifies whether they were assessed as challenges or strengths. Planning tasks that were most challenging for provinces were those indicated at the start and end of the analytical framework, relating to setting of an ideal vision, environmental scanning, implementation and monitoring, and evaluation phases. At the same time, the four phases in between—setting policy goals, preparation of plans, designing implementation and adopting plans—were strengths.

**Table 5.1** Summary of planning tasks by phase, indicated as challenge or strength (%)

Stages	Phase	Challenge			Strength	
		<i>Not Sure</i> (%)	<i>Never</i> (%)	<i>Sometimes</i> (%)	<i>Often</i> (%)	<i>Always</i> (%)
Initiation and Scoping	1. Developing ideal vision	4.8	6.2	56.2	24.8	8.1
	2. Environmental scanning	4.1	14.0	43.2	28.6	10.2
	3. Setting policy goals	1.4	8.6	26.7	32.4	31.0
Planning	4. Preparation of the plan	1.4	5.7	32.9	37.9	22.1
	5. Designing implementation	2.9	8.0	37.2	28.0	24.0
	6. Adopting the plan	1.5	5.8	24.4	40.2	28.2
Implementa- tion	7. Implementation and monitoring	1.9	9.5	48.1	29.1	11.4
	8. Evaluation	6.1	13.9	39.2	26.9	13.9
	<b>Overall</b>	3.0	9.0	38.5	31.0	18.6
		3.0	47.5		49.6	

*Research question 2*

*What practices that tend to enhance and sustain education planning are evident in a province's education planning process?*

*Research question 3*

*What practices that tend to inhibit education planning are evident in a province's education planning process?*

These two questions were answered compositely under the eight phases of the analytical framework.

*Phase 1 Developing an ideal vision.* The study revealed that provinces develop vision and mission statements consistent with both provincial and national government policies. On the other hand, it was found that not everyone that has an interest in education is inspired to share the vision. As a result, there is a decline in the stakeholders' trust in government and education administrations and subsequently, a dropping off in their identification with planning and policy decisions. Wider stakeholder input and awareness of vision are needed to remove the current fallacy that representation by stakeholders in authorities such as Provincial Education Boards (PEBs) is sufficient.

*Phase 2 Sector and situation analysis (or environmental scanning).* Findings indicate that provinces mainly establish their operating environment through several generic data collection methods such as monthly school returns and inspector reports or even petitions. Plans are subsequently developed to address needs and concerns. However, the data collection process from schools is unreliable and provinces do not consistently and systematically analyse reports, especially qualitative ones. A lack of resources hinders physical visits to review implementation levels and check reports. This situation encourages the chance to fabricate data. Training of staff in environmental scanning techniques and strengthening the capacity at district levels are immediate needs.

*Phase 3 Setting policy goals.* The study reveals that provinces often develop policies sensibly based on their own needs and aspirations, and consistent with national policies. Further, provincial governments develop and assign policies and development goals, and task the education sector to achieve these. On the

other hand, some stakeholders do not always contribute to policy on critical issues that will affect them directly. A lack of awareness of policies by education authorities has on occasions led to political grandstanding. This leads to politicians and bureaucrats scurrying to accommodate domino effects by shifting resources, adjusting plans and so on. The DoE is at times limited by legislation to correct some bad provincial government decisions, and thus other counter mechanisms need to be considered.

*Phase 4 Preparation of plans.* It was found that when goals, programmes and strategies are developed to meet provincial government policies, considerations of resource and management capacity are kept in mind. However, sometimes complacency creeps in, which inhibits consistent consultation with stakeholders when resource gaps emerge. This situation forces planners to realign original plans and strategies, and the resultant resentment can hinder implementation. While provinces adopt and apply some cost effective measures suggested by the DoE, there is still a need for more awareness to generate and harness potential community resources.

*Phase 5 Designing implementation.* It was found that provinces develop flexible long-term implementation plans for school restructuring, which encompass other elements such as teacher deployment. A school plan software programme (developed by the Facilitating and Monitoring Unit of the DoE) also enhances planning. However, findings suggest that provinces would do well to operationalise long-term plans into manageable annual plans, so that they can focus on achieving certain parts of their plan incrementally. Doing so would allow them to achieve the total plan more effectively. This operational planning weakness was also noted in projects and some programmes within plans. Secondly, political, resource and management instability in some provinces causes wholesale changes in the implementation of plans, thus hindering systematic implementation and making monitoring difficult.

*Phase 6 Adopting the plan.* The results of the study were consistent with the literature that was reviewed in finding that planning committees and stakeholder consultations at appropriate times help in approval of plans (McKinnon 1973). All provinces have a written long-term education plan. It was found that

unapproved plans have been implemented, because a number of provinces' plans took more than a reasonable time before they were properly approved. This is for reasons such as frequent changes in senior staff, provincial government suspensions and provincial governments' fear of resource implications. It is, in these circumstances, ironic that frequently, provincial governments do not stop implementation of unapproved plans. Two implications emanate from these findings: first the implementation of education plans has no formal provincial government commitment and so, technically the provincial governments are not accountable; and secondly, unapproved plans leave a lot of room for undue influence and change.

*Phase 7 Implementation and monitoring.* While the support of some provincial governments and communities for provincial education plans is commendable, it is partially due to their having advance awareness of the plans. When approved and printed, plans normally are distributed to stakeholders, although costs may limit a wider distribution, to rural areas in particular. The printing of significant and relevant parts only is an alternative, if only for purposes of raising awareness. The study also found that implementation of plans and their monitoring are inhibited by a number of factors that hinder the whole planning process. The high turnover of senior staff, remoteness of schools and a lack of resources are just three hindering factors. Also, monitoring is rather sporadic, as opposed to systematic and regular. This is most likely due to a lack of capacity, little or no training of key staff and financial constraints.

*Phase 8 Evaluation.* Some provinces show in their plans explicit intent for systematic evaluation using appropriate frameworks, but do not apply them comprehensively, mainly because they lack the capacity and the time. It is assumed that the multiple responsibilities that are the planners' lot limit the time they have at their disposal to give to planning activities. Nevertheless, general evaluation of the sector, including plans, is carried out and reported at various levels, including public forums.

Two remedies could help to produce deeper and impartial assessments: research and the use of consultants. Recourse to these in the provincial cases is limited by costs. Alternatively, prior to provincial forums, evaluations could be carried

out more prudently at each implementation level, such as districts, and education sector levels. In addition, some hold the view that leaders, in fear of possible effects on their career, deliberately avoid evaluations that may expose weaknesses.

#### *Research Question 4*

*How could provincial-level education planning in the implementation of education reforms in PNG be improved?*

The study identified a number of problems as central to ensuring effective provincial-level education planning processes in the implementation of education reforms in Papua New Guinea. Recommendations following from the analysis of the findings of the study, and categorised according to the eight planning phases, are given in Table 5.2.

#### **Implications for practice**

The main contribution of this study to educational planning in developing countries including the South Pacific region has been the creation of the analytical framework (see Appendix 5.1) drawn from contemporary strategic planning models. This was designed to help identify strengths and challenges in current planning processes used by organisations and to help them survive and perform well in the current challenging political and economic environment. Planners need to understand the process in order to use this knowledge in improving education planning processes.

Provincial-level education planning in Papua New Guinea has taken place unsystematically (with the exception of efforts in the early 1980s) until the most recent national effort, which primarily targeted the facilitation of education reforms. The education plans of many of the provinces are due for review, and other provinces are due to develop new plans within the next one to two years. There have also been suggestions for district education plans (*The National Online*, accessed 14 August 2002; Wari, 2000). Findings of this study have implications for the imminent plans, and reviews need to take into account those that are relevant to each province and level.

Table 5.2 Recommendations for Action

Phase	Problems/Challenges	Recommendations
<p><b>Phase 1</b>  <b>Developing an ideal vision and goals</b></p>	<ul style="list-style-type: none"> <li>- Insufficient consultation in the development and awareness of vision</li> </ul>	<ul style="list-style-type: none"> <li>- Use of techniques such as brainstorming, and slip/card writing to collect views from participating public to determine vision</li> <li>- Targeted awareness, e.g. reaching out to rural and illiterate population</li> <li>- Provincial education theme relevant to province's vision to be conceptualised each year and celebrated with national theme cum education week celebrations</li> </ul>
<p><b>Phase 2</b>  <b>Sector and situation analysis</b>                      (environmental scanning)</p>	<ul style="list-style-type: none"> <li>- Inconsistent communication and consultation by provincial and district education offices</li> <li>- Lack of resources and awareness of systematic environmental scanning techniques</li> </ul>	<ul style="list-style-type: none"> <li>- Provincial administrations and district budget and planning committees develop and sustain district infrastructure and resource capacity</li> <li>- A mandatory meeting held each quarter between key provincial staff and District Education Administrators, where a standard report on strategic areas is presented and discussed</li> <li>- Provincial education office planners design mechanisms to consolidate all quantitative and qualitative evidence that is gathered, and present analysis on a regular basis.</li> <li>- Training of key district and provincial education staff on practical environmental scanning techniques</li> </ul>
<p><b>Phase 3</b>  <b>Setting policy goals</b></p>	<ul style="list-style-type: none"> <li>- Not enough proactive policy and consultation with stakeholders</li> <li>- Inappropriate and inconsistent awareness of policies and their</li> </ul>	<ul style="list-style-type: none"> <li>- Provincial Education Boards institute mechanisms that make consultations and awareness mandatory in the development and implementation of policies</li> <li>- Quarterly provincial state of education reports be presented to stakeholders, including provincial government members</li> <li>- Strengthening persuasive power of DoE by instituting an implications incentive mechanism to encourage good practices in provincial education planning and policy implementation</li> </ul>
<p><b>Phase 4</b>  <b>Preparation of plans</b></p>	<ul style="list-style-type: none"> <li>- Inconsistency in consultation with stakeholders</li> <li>- Political instability and subsequent and regular policy and priority shifts</li> </ul>	<ul style="list-style-type: none"> <li>- Consistent awareness and consultation of changes be made mandatory by PEB upon planning committees</li> <li>- Annual operational planning and regular plan reviews held to accommodate policy and resource shifts</li> </ul>

<p><b>Phase 5 Designing implementation</b></p>	<ul style="list-style-type: none"> <li>- Lack of focus and strategic direction to implement long term plans</li> <li>- Stakeholders not fully aware in advance of plans and their effects upon them</li> <li>- Instability in politics and social environment</li> </ul>	<ul style="list-style-type: none"> <li>- Training of planners and key education staff in annual strategic operational planning</li> <li>- Carry out proactive awareness of education policies and related education plans on targeted audiences</li> <li>- Help planners to develop a better understanding of the political and social factors having an impact on planning</li> </ul>
<p><b>Phase 6 Adopting plans</b></p>	<ul style="list-style-type: none"> <li>- Lack of formal negotiation and writing skills needed to prepare formal submissions</li> <li>- Lack of accountability requirements on some planning committees, resulting in their ineffectiveness.</li> </ul>	<ul style="list-style-type: none"> <li>- Incentives to retain education planners and managers with experience</li> </ul>
<p><b>Phase 7 Implementation and monitoring</b></p>	<ul style="list-style-type: none"> <li>- An absence of inherent and systematic monitoring and subsequent strategic intervention</li> </ul>	<ul style="list-style-type: none"> <li>- PEBs ensure their committees' effectiveness by making them more accountable via mandatory quarterly reporting</li> <li>- Targeted training in monitoring techniques and strategic interventions, with application</li> <li>- DoE, inspectors and provinces negotiate an understanding to involve school inspectors in monitoring, but without derailing them from their primary inspectorial tasks</li> <li>- Strengthening capacity of district education offices</li> </ul>
<p><b>Phase 8 Evaluation</b></p>	<ul style="list-style-type: none"> <li>- Burdening planners with multiple roles eats into the time they can devote to evaluation</li> <li>- Time and costs limit comprehensive and research based evaluations</li> <li>- Lack of practical know-how to evaluate systematically</li> <li>- Lack of time to report, and to receive sufficient feedback from the public in provincial-level evaluations cum summits</li> </ul>	<ul style="list-style-type: none"> <li>- Provinces reduce assignment to planners of responsibilities unrelated to planning.</li> <li>- Training of provincial and district staff in evaluation and post evaluation strategies</li> <li>- Divisional and sub-sector evaluations to be carried out prior to provincial summits</li> </ul>

Political commitment and the availability of resources to implement plans will often remain an uncertain element in provincial education planning in Papua New Guinea. Mintzberg (1994), alluding to this fact, stresses the unreliability of forecasting, and cites Ansoff's comment (1965) that while planning even for two years is notoriously inaccurate, the alternative of not planning at all can be catastrophic. Murphy (1991) emphasises that planning is not futile. The necessity in the first instance is to develop short-term plans—one-year operational plans that align with long-term plans. The former must be very short, but must articulate targets, priorities and outcomes, assigned to each sub-sector each year, based on actual resource availability.

A further practical implication is that to enhance the effectiveness of education planning, the uncertainty of the political and economic environment, and the management capacity of the implementing organisation, need to be examined. Doing so requires education managers to have knowledge of strategic planning scanning processes, an awareness of the political, social and economic environment, and an understanding of a suitable, well conceived planning model, in order to use this knowledge to enhance the provincial planning processes.

### **Implications for future research**

In the study, it became apparent that a number of variables impinge on effective education planning at the provincial level. These, succinctly, are: awareness and consultation between education planners and stakeholders in education; training and capacity sustenance of education planners and managers; capacity of district education staff; selection of education planning technologies; leadership and management; resource allocation and shifts; and external social, economic and political factors. These variables individually or collectively invite further research.

A second area of research interest would be an evaluation of any of the practices arising from the recommendations made in this study to improve the effectiveness of education planning at the provincial level. Success criteria would need to be formulated and a methodology framed to establish whether the planned outcomes had been met.

## **Conclusion**

In conclusion, education planning at the provincial level demonstrates strength in some of the tasks, and challenges in others, both within and between the phases provided by the analytical framework. The 20 provinces with long-range plans have established goals and projections and have in this way provided some organisational stability and vision. However, many provinces operate on intuition or sporadic plans. The challenges identified in this study are partly a result of the planning approaches provinces already have. Also, the challenges are a consequence of both internal and external environmental factors such as lack of resources and political support, high turnover of planners, lack of awareness and consultation for creating visions and plans, and absence of consistent good management.

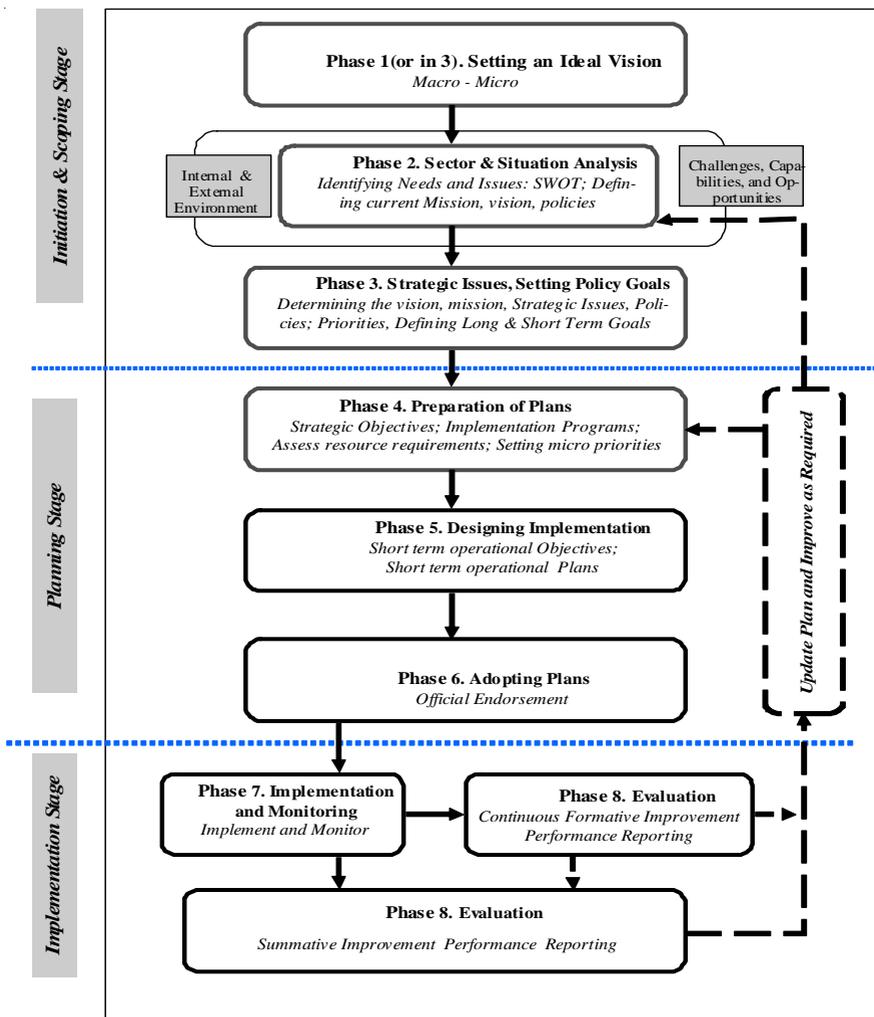
Nevertheless, it is believed that the increasing challenges facing provincial education administrations can be addressed by capitalising on their strengths and minimising the weaknesses. Doing so would involve a paradigm shift in their planning approach. It is imperative for education managers to turn to a planning process that is proactive and forward-looking without losing the ability to be reactive to situations, to adapt to changing conditions and to keep a shorter time frame in mind as well.

It is the conclusion of this study that in addition to their long-term plans, education administrators and planners in Papua New Guinea must consider annual strategic operational planning. This would involve breaking down the long-term plans into more discrete operational plans that will help to achieve long-term goals. The analytical framework developed for this study might be a useful guide in developing more meaningful planning strategies for education reform in Papua New Guinea. Germane to this assertion is the advice that education planners and managers would do well to take note of:

- ownership of plans by stakeholders
- awareness and application of bottom-up and top-down planning approaches
- having tight links between goals/priorities and budget.  
This includes realistic budgets and pragmatic strategies to cover resource gaps
- developing contingency planning
- initiating and gaining political support of plans.

## Appendix 5.1

### Analytical Framework – An Integrated Education Planning Process Model



Source Author and integration of other authors' models

## 6

### **The role of data in educational planning**

*Eveli Tokai*

A good education strategic plan is one that is supported by relevant and up to date data. Data may take a number of different forms, such as student achievement information, census data, staff numbers and qualifications and the like. A body of data, though, cannot be used effectively until it is turned into information, that is to say data that have been organised and analysed and can be used for decision-making. Chapman and Mählck (1993:1) note that:

many developing countries are now making substantial gains in developing databases on their education systems. A considerable amount of attention and resources are being devoted to the design and implementation of educational information systems as a means of providing decision-makers with more accurate, relevant and timely information for policy formulation and planning.

In the Pacific region, donors such as NZAID, which has provided assistance through funding and the provision of technical expertise to develop computerised Education Management Information Systems (EMIS) in the Cook Islands and Solomon Islands, and AusAID with assistance provided to Fiji, Kiribati, Samoa

and Papua New Guinea, to name a few, have placed an emphasis on the importance of data to support strategic planning in education and in the decision-making processes in those countries.

The Ministers of Education of the Pacific Island Forum Countries in their meeting in Auckland in May 2001 emphasised that ‘in order to develop sound policy and planning frameworks it is essential to improve data and information collection and retrieval systems to provide accurate, timely and relevant data for informed policy decisions’ (PIFS, 2001: 3). As a result of the agreement made by the Ministers, the PRIDE Project, as stipulated in its Workplan for 2004, was mandated to hold by the end of October 2004 a regional (Fiji) workshop on strategic planning methodologies for basic education, including data collection and analysis techniques.

One of the specific objectives of the first regional workshop held in September 2004 was to provide specific training for National Project Coordinators (NPCs) and data managers in strategic planning methodologies for education, and in appropriate techniques for the collection, analysis and management of educational data for planning purposes. Two and a half days were allocated for workshop sessions. The main purpose of group discussions was for the participants to share experiences regarding their progress and where they were in terms of management and utilisation of data in each of the countries. In addition, the session was used as a forum to identify issues and challenges as well as identify what countries can do to improve the collection, analysis and reporting of data to support planning.

The purpose of this paper is to describe and document the outcomes of the data managers’ workshop sessions, which were conducted parallel with workshop sessions for the PRIDE Project NPCs. After showcasing the Kiribati Education Management Information System (KEMIS), it discusses progress of the development of the Solomon Islands Education Management Information System (SIEMIS). This is followed by an analysis of the challenges faced by data managers in the collection, entry and analysis of data. A preliminary overview of measurable indicators is also provided.

## **The Kiribati Education Management Information System (KEMIS)**

KEMIS uses an Access database to store data gathered from schools from year to year; analyse data so as to identify trends and changes in the education system; produce statistical reports and charts to help with planning and education management; and produce UNESCO EFA Indicators.

This database was funded by AusAID and implemented by UniQuest, a University of Queensland company, and the Ministry of Education, Youth and Sports (MEYS), Kiribati. KEMIS was designed in outline in September 2001 and developed in detail during a three-month period from November 2001 to February 2002. It was developed using the standard Access software and was customised to permit the analysis and presentation of data and the making of effective decisions about the strategic development of the education system. Mrs Era Etera, Education Officer Statistics, Kiribati, and Rebecca McHugh, Project Coordinator, UniQuest, showcased KEMIS to the participants.

### **The KEMIS project goals**

The goals of the KEMIS Project are to establish a useful, powerful and efficient system for managing data and information at MEYS; make use of modern technology consisting of a database system and computers; and ensure KEMIS is a resource from which everyone in the MEYS can benefit.

Previously, data have always been available about the education system in Kiribati. However, these were entered and stored in Excel. As a result, data retrieval was slow and the storage of data was not satisfactory, which contributed to the loss of several years' data. KEMIS has been designed to solve all these problems. A lot of quality educational data has now been collected, entered and stored in KEMIS, all of which can be retrieved at the press of a button.

### **Data entry, analysis and reporting: what can KEMIS do?**

Three years of data, 2002–2004, have now been entered in the database. KEMIS now holds a lot of information gathered from every school in the country. Data in KEMIS can be used to generate reports on school resources, facilities and conditions of facilities in each school, and make comparisons among schools,

villages, islands and by districts. In addition, other data stored include, among other things, the number of pupils and teachers, ages by enrolment, participation by gender and qualification of the teaching staff. The database also stores detailed information about school enrolments, including the number of enrolments by age, class level and gender. These figures can be compared among schools, islands and districts. The database also has data about how many pieces of furniture each school has in its rooms, and all of the different types of furniture each school has.

### **The outlook for KEMIS**

As survey data are entered each year, the understanding MEYS staff have of the education system in Kiribati will become more and more detailed and in particular, the staff will be able to do the following: make comparison by year; track growth and changes by district, island, village and school; monitor rates of non-attendance, repeating and enrolments; evaluate the conditions and future of the teaching profession; and see trends in the participation of students by gender, ethnicity and other categories of analysis.

### **Plans for Solomon Islands (SIEMIS)**

There is a clear weakness in education sector management in Solomon Islands in regard to education data collection, data analysis and reporting. While there are some data available on schools, teachers and students, they are mostly incomplete and fragmented. The Ministry of Education and Human Resources Development (MEHRD), with AusAID assistance, commenced in 2001 with the development of the database required to manage school returns and other data used to monitor and plan the development of the system (Solomon Islands Government, 2004). This work has been continued with the support of the EU, but the task remains incomplete, because the ministry is unable to process rapidly or report completely and accurately on the status of the education system. The ministry has sought assistance from NZAID and EU to establish a fully integrated Education Management Information System (EMIS) based on the model recently established in Kiribati.

NZAID and EU have agreed that they will jointly finance the project, the purpose of which is to design, develop and establish an effective EMIS for the Solomon Islands. The system will provide information in a format that will enable the managers of the education system at national and provincial levels to undertake specific analysis of trends and needs and to use these analyses to make effective decisions regarding the development of the system and, in particular, the allocation of resources.

The project started in May 2004. The first component was the review and re-design of MEHRD's existing survey instruments and the completion and costing of hardware and software specifications for the project. The other components will include the following: software design; hardware and local and wide area network; data entry, analysis and reporting; training and capacity building; budget process synchronisation and resource allocation; and strengthening of the planning and statistics unit.

The completion of the SIEMIS will allow for the collection of more detailed and accurate school, student and teacher data and the improvement of its analysis and reporting, to facilitate the achievement of objectives of the Education Strategic Plan

## **The challenges of data collection**

### **Sharing of approaches and instrumentation**

The group discussions focused on the following questions:

1. What system/instrument is used for collecting educational data?
2. What type of data do you collect?
3. How often are the data collected and updated?
4. Do you have a centralised database system? If yes, what program do you use?
5. Does your Ministry have a separate/special unit responsible for data collection and processing?
6. Discuss the techniques used for dealing with non-responding schools.

The answers to the above questions are discussed in detail below.

**What system/instrument is used for collecting data?**

All countries use school questionnaires or survey forms to collect data, as indicated in table 6.1. These forms are sent to schools for principals to fill in. Completed questionnaires are then sent back to the district, provincial or central education office, depending on which office is responsible for data entry. However, in Palau questionnaires are sent out electronically to all schools and completed forms are sent back electronically to the central office.

**Table 6.1** System/Instrument for Collecting Data (at September 2004)

Country	System	Instrumentation
Cook Islands	Excel, Word and DOS currently being upgraded to Access program	School questionnaire survey form
Fiji	Access program	School questionnaire survey form
FSM	Pacific Education Database Management System (PEDMS)	School questionnaire survey form
Kiribati	Access program	School questionnaire survey form
Marshall Islands	Pacific Education Database Management System (PEDMS)	School questionnaire survey form
Nauru	Manual	School questionnaire survey form
Niue	Manual	School questionnaire survey form
Palau	Pacific Education Database Management System (PEDMS)	School questionnaire survey form
Papua New Guinea	Access program	School questionnaire survey form
Samoa	Access program	School questionnaire survey form
Solomon Islands	Access program	School questionnaire survey form
Tonga	Excel and Word	School questionnaire survey form
Tokelau	Manual	School questionnaire survey form
Tuvalu	Access program	School questionnaire survey form
Vanuatu	Access program	School questionnaire survey form

***What type of data do countries collect?***

Data collected range across such matters as student information, teacher information, school information, school facilities, financial information, school equipment and furniture, curriculum and school support staff. The range of data collected depends very much on the needs and the size of the particular country. What was common in most countries was that each country had two databases, one specifically for general school information and the other for student examination results (external examination results). Databases of the second type, which are established mainly because of the confidential and sensitive nature of the students' performance data, may be located within the Curriculum Development Units or with the Examination Sections or Monitoring and Evaluation Divisions within the Ministries of Education (MoEs).

***How often are the data collected and updated?***

Frequency of data collection varies from country to country. In some, data are collected annually while in some, collection occurs quarterly, depending on the urgency of the data required.

***Do you have a centralised database system? If yes, what program do you use?***

It is interesting to note that some small countries still do not have a centralised database system (see table 6.1). Countries with a computerised database have Excel, Access or DOS programs. Countries that do not have a centralised database system store and access their information manually, which is a very time consuming process.

***Does your Ministry have a separate/special unit responsible for data collection and processing?***

Some countries, especially the smallest island states, do not have a separate statistics unit to collect and analyse data the responsibility is simply added to the workload of another department. As a result, the statistics area is often neglected. In Nauru, for example, the MoE does not have a statistics unit and national statistics are coordinated by the National Statistics Bureau.

**Discuss the techniques used for dealing with non-responding schools.**

Data need to be improved and updated. All too often school data are collected by non-motivated and uninterested teachers and principals, who may or may not send the questionnaire to the MoE. Non-responding schools was a common problem highlighted by some countries. There were several techniques listed by the groups to deal with non-responding schools, the common ones including:

- sending reminder notices by official memo, phone, fax or e-mail
- site visiting by the education staff to collect questionnaires
- citing non-responding schools in the performance evaluation of the school principals
- surcharging school principals and making deductions from their salary
- withholding government grants to non-responding schools.

**Data entry and analysis**

The questionnaires are sent to the schools to be filled by the principals. The completed questionnaires are then sent to the District Education Office, the Provincial Education Office or to the central office for data to be entered into the database.

There was a consensus on the need for a common approach as to the type of computer program used, though the database design must be unique to each country. This would ensure uniformity in the training of data managers and would enhance countries' ability to help and to learn from each other, as there are elements in the database common to all the countries.

Education ministries in each of the 15 countries use their database to report on the development of education in their countries. The medium of reporting varies from country to country but some of the common ones include the publishing of annual statistics reports/digests, annual reports, reports to UNESCO and other organisations, and ad hoc reports using information from the database.

The group also highlighted the need to have timely, relevant and accurate data to support the work of educational planners. Planners need baseline data against which to measure performance. The group also pointed out that planners must have the necessary skills to access data from the database and to analyse and report on that information.

Discussion to identify challenges for data managers listed the following common ones:

- lack of personnel within the ministry
- in many cases, lack, in people responsible for the database, of the necessary skills in data analysis and reporting
- the perception that managing the database is additional to their workload, meaning that at the end of the day, the database is often neglected
- duplication of roles, for instance when departments collect their own data
- urgent need for data managers to be trained in the analysis and reporting of data
- need for training for principals and other data providers on how to fill out survey forms.

From the preceding discussion, it is evident that all the countries should have well trained data managers in the area of data analysis and reporting, in order to provide relevant and timely information to assist planners and decision makers make informed decisions.

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**How do we achieve maximum synergy between the collection, management and reporting of educational data and strategic planning?**

**Data Collection**

As indicated, the most common method of data collection is the use of school questionnaire survey forms. In some countries, responsibility for data collection falls on a central unit in the MoE; in others, schools themselves take on this responsibility.

Some common issues highlighted in the group discussions include difficulties in obtaining timely and accurate data, and the relevance or completeness of data being gathered. As well, there is a need to incorporate different kinds of data (e.g. examination and finance data) into school data sets. In some cases, data auditing is not carried out or not emphasised, because of system limitations or time constraints. It seems that data managers have been doing many different kinds of analysis (even if they have not been calling it analysis). Some common approaches in data analysis include: comparisons (among schools/regions etc.), reporting to benchmarks/strategic plans, and reporting on year-on-year trends. Another issue is that of problems in the data gathering stage impacting upon data auditing and analysis, especially when survey forms are not returned or not filled completely, or data providers provide the wrong information.

### **The data cycle and strategic planning**

If the data cycle is running well, its outputs will be useful for strategic planning. For the data cycle to run well, there needs to be good communication and cooperation between data providers, data managers and data users (planners). In addition, for all players in the cycle to fulfil their roles, they need to have their needs met.

#### **Data provider needs**

Data providers (e.g. principals) need training to make the collection process (filling in of survey forms) as clear as possible. They need to know where their contribution fits in. In addition, data providers need feedback and exchange of information, especially in the form of data relevant to them, and they need to have their time constraints recognised.

#### **Data manager needs**

Data managers need clarity of objectives and requirements, and they need to be involved in the strategic planning process or at least to have a very clear understanding of its objectives. In addition, they need support for the audit process and they need training in data collection, data auditing and analysis, and data reporting.

### **Data user needs**

Data users need quality data (timely, accurate and relevant) that they can have confidence in. They need data providers who are responsive to ad hoc requests. Furthermore, they need to have an understanding of the data input and analysis process.

### **Understanding of roles**

All players (data providers, data managers and data users) need to have a clear understanding of what their roles are. It is important that in order to achieve synergy between collection, management and reporting, data managers and the planners who will be using their data decide together on the following:

- Who is responsible for analysis (first level and second level)?
- What are the objectives for the analysis and reporting processes?
- What format and layout should be used for reports?
- Who can receive what information?
- Who has access to what kind of data?

### **Data managers and strategic planning**

The development of strategic plans is a key feature of the PRIDE Project and an opportunity exists now for data managers to be a part of this process by being involved in customising, analysing and reporting to those strategic plans. The process of developing the strategic plan, or at least the process of developing the indicators, must include data managers.

Another opportunity for data managers to be a part of the process is to arrange for them to sit down with planners and take them through the data cycle as it exists, pointing out where changes can/should be made in order to meet strategic planning needs. This has an added advantage of giving planners a thorough understanding of the data process that data managers know so well but planners may not be familiar with. If planners know the process and the kind of information that is available, they can make more and better use of data.

### **The development of measurable indicators to evaluate the extent to which strategic plans achieve their objectives: a preliminary overview**

What is an indicator? According to Sauvageot (1997: 16), an indicator may be defined as:

a tool that should make it possible to have a sense of the state of an education system, and also to report on that state to the whole of the education community, in other words to the whole country. One misunderstanding is very important to avoid: an indicator is not an elementary item of information. It is information processed, so as to permit the study of an educational phenomenon.

The characteristics of a good indicator include its relevance, ability to summarise information without distortions, precision and comparability, and reliability. A good indicator should do the following:

- measure how far or how close one is from an objective
- identify problematic or unacceptable situations
- meet policy concerns, and answer questions leading to its choice
- compare its value to a reference value.

Sauvageot (1997) further emphasises that in order to construct a good indicator, one has to be able to identify the most interesting phenomena to measure, which will depend on the individual country's choice, as inspired by the objectives of its education policy. For example, the enrolment rate (net enrolment and gross enrolment) in primary education is a good indicator. But when a country has a full school attendance, much of its importance as an indicator is lost.

In summary, indicators play an important role in the monitoring and evaluation of the functioning of the education system. In addition, indicators must also aim to describe the education system.

## **Conclusion**

This chapter has provided a description of the outcomes of the discussions of the 15 data managers who attended the first PRIDE Project regional workshop in September 2004. In particular, the Education Management Information Systems in Kiribati and the Solomon Islands were discussed. As well, the challenges that data managers face in the Pacific in relation to data collection, entry and analysis have been articulated.

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## 7

### **Strengthening education management information systems**

#### **better use of data for better strategic planning**

*Rebecca McHugh*

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Throughout the Pacific region the delivery of public education is guided by strategic planning, carried out by Ministries of Education (MoEs) working towards the achievement of broader national development goals, and within frameworks set by national planners. Education Strategic Plans (ESPs), while reflecting national development priorities, often incorporate broader global initiatives for access, equity, quality and efficiency in public education provision, such as the UNESCO *Education for All (EFA)* framework and the United Nations Millennium Development Goals (MDGs).

ESPs have enormous scope and impacts. At the highest level an ESP can be seen as guiding the human resource development of an entire country. At a sectoral management level ESPs must consider how to direct the spending to areas of strategic priority; how to allocate scarce resources most efficiently; and how to prepare for future expansion and growth while equitably extending access to education to the whole population. At an operational level, strategic plans give consideration to, amongst other issues the relevance and currency of curricula and assessment or evaluation; the professional development needs of the teaching service; the condition of public school facilities, including providing for their

ongoing maintenance; and providing maximum learning opportunities for students with diverse interests and abilities.

Education strategic planners in the Pacific face a combination of challenges that is not common elsewhere in the world. For example, most Pacific education systems have to meet the varied needs of populations that are growing rapidly; are spread across several different islands, often at great distances from each other, or in mountainous areas, often accessible only on foot, after hours' or days' walking; have different levels of technological capacity; and include a diversity of cultural, linguistic and religious perspectives.

In order to make effective policies and decisions that reflect broader national strategies, and incorporate internationally recognised measures of quality, access and efficiency in public education delivery, education sector strategic planners need to have the most complete information about their education system. Information in various formats underpins sound decision making and effective planning. Raw data from school surveys, stakeholder feedback, aggregated and summarised sector statistics, maps, trend analyses and projections can all help to form a comprehensive picture for the education sector of existing capacity, priority needs, areas for growth and expansion, disadvantaged groups and success stories.

Effective strategic planning requires the ready availability of accurate and relevant information. A well-functioning Education Management Information System (EMIS)—by which is meant the people, processes and technologies involved in collecting, processing, disseminating and acting on information about the education sector—will produce accurate information, in formats relevant to various stakeholders, within useful timeframes.

This chapter discusses ways of maximising the utility of education sector data, by improving the data quality, to support strategic planning and policy making. In the first section, the chapter considers the role of an EMIS in producing quality data. The three main stages of an EMIS cycle—data collection, data treatment and data use—are then considered in turn, and various means of strengthening each part of the cycle are discussed.

### **Education management information systems and quality data**

An EMIS should not be thought of as a technological solution alone. It is the information system that facilitates the communication flows needed to manage an education system. An information system therefore includes all of the people, computer applications and other communications technology, processes, policies and procedures involved in making sure that the right information flows to people who make decisions and take action within the education sector.

Thinking about an EMIS in this way reveals two vital features of an information system. First, it is about much more than simply technology. While a good EMIS computer application can make the job of collating, analysing and reporting on education sector data much easier, it cannot function effectively without well-informed people and well-structured processes around it. Secondly, a good information system is about effective communication and information flows: information needs to flow up to decision makers and down to action takers equally smoothly. The people involved need to have opportunities to contribute to the information system as well as make use of the information it produces. The processes by which data are gathered, collated, organised, stored, analysed, shared and acted upon need to be logically structured and well organised. Information systems should support an entire network of education sector stakeholders, at the level of strategic planning, at the level of information management, and at the grass-roots operational level. An EMIS should take raw data about the education system, and through analysis and interpretation, turn it into useful information that can be acted upon.

Information in its various forms supports strategic planning in three main ways. First, it acts as a diagnostic tool that forms the basis of plan development. Secondly, it acts as a monitoring and evaluation mechanism that enables planners and policy makers to assess how well the ESP is achieving its stated goals. Finally, information is the means by which education sector needs, achievements and development can be communicated to the many stakeholders in public education (Carrizo, Sauvageot & Bella, 2003).

As a diagnostic tool, information enables strategic planners to assess the existing capacity and characteristics of the education system. This assists with setting

priorities for future development, identifying areas of greater need or strategic priority for resource allocation, and developing timelines and action plans for the phased implementation of the over-arching ESP goals.

As a monitoring and evaluation mechanism, education sector data provide a means by which progress towards ESP goals can be measured. Effective strategies can be identified and replicated, unsuccessful interventions can be re-assessed and redirected.

As a reporting and promotional tool, education sector data enable strategic planners to inform education sector stakeholders of the state and progress of ESP implementation. Data can be used to promote and encourage community support for education institutions. Data also are the means by which accountability and transparency in education sector spending and resource allocation can be demonstrated.

For information to fulfil all of these important roles effectively, it needs to be based on good quality data. Quality data can be thought of as having three key attributes: it is accurate, relevant and timely.

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### **Data accuracy**

Education planners need to have confidence in the data they will use to develop national strategies and action plans. The broader community of education sector stakeholders needs to feel confident in the data in order to believe that national strategies are driven by objective diagnostic processes, effective analysis and monitoring systems, and transparent and accountable decision making. If data are accurate, comprehensive and truthful, information users will have confidence in them. Data need to be verified and audited thoroughly, as well as analysed correctly, in order to be accurate.

Auditing data involves identifying obvious errors, investigating outliers (i.e., results that seem unusual compared with the rest of the data set) and ensuring the comprehensiveness of the data collected. It is important not only to audit and cleanse data but also to make clear and public the processes by which they have been audited and cleansed. This is especially true in situations where data are

being used to guide resource allocation decisions. If stakeholders, policymakers and planners are presented with a data set that they can feel confident reflects to a significant degree the reality of the situation at hand, they will feel happier with decisions being made based on that data.

### **Data relevance**

The relevance of data to strategic planners will depend on many things. First, in order to be relevant, data collection, analysis and reporting processes need to reflect the structure of the national education system in question. While it is important to be able to feed information and major findings into regional and international monitoring and reporting fora, ultimately first priority should be given to making sure that information is gathered and presented in ways that are relevant to the local context and the priorities of national strategic plans. If an ESP is in place then indicators of progress towards the achievement of the central goals of that plan should be used to guide data collection and analysis processes. If the data being gathered can ultimately be analysed and used to report against those indicators then the reports produced will be extremely relevant to strategic planners assessing progress to date and articulating subsequent actions to be taken.

Ensuring the relevance of data for users is also about tailoring and shaping those data to suit the information needs of their intended audience. Good quality data will be grouped, analysed and summarised in different ways so that information users can quickly get what they need to know from reports. For example, members of the national government may need only high-level summary reports on data that have been gathered, whereas school management boards may be more interested in detailed operational-level information about schools in their local area. Data relevance as a facet of data quality is therefore also about being able to provide different types of information to different audiences according to their needs and interests.

The issue of data relevance is also connected to considerations of who should have access to what kind of data, and making sure that information goes out only to relevant audiences. Politically sensitive or personal information should

not be distributed outside of the MoE without high-level clearance. For example, personal data about teachers should be kept out of the public eye, and should have only restricted circulation even at the MoE.

### **Data timeliness**

Timely data are both current and available when needed. Current or up-to-date information strengthens strategic planning processes because it enables planners to base future initiatives on what they know to be existing capacity and realities in the education sector.

Timely data are available when they are needed most—in time for planning and budgeting processes. National timelines for budget preparation should determine deadlines for the EMIS process. This means time has to be allowed for data to be collected and processed well ahead of planning and budgeting processes, so that the information being fed into those processes is both current and available.

When timely, accurate and relevant data are fed into an EMIS, the people and processes in place to analyse and interpret those data turn them into information about the education sector that can be used for strategic planning. The flow of data and information through an EMIS can be seen as moving through three main stages: data collection, data treatment, and information production and dissemination. These three stages work in a cycle through which information flows promptly to people who need or seek it. Considering each stage in turn reveals several useful ways in which the cycle can be strengthened to improve the accuracy, relevance and timeliness of the information that is produced by the system and fed into policy-making and planning processes.

## **Stage one: data collection**

### **System**

#### **(a) People**

The people involved in data collection are principally school administrators and data collectors from the MoE. At the schools themselves data are collected and aggregated in order to fill in MoE survey forms. At the MoE an equally important

role is played by the people who distribute, gather, collate, file and check surveys. Data are sometimes also gathered from sources outside of the MoE and school system, such as other government agencies.

**(b) Process**

The information exchange at the data collection stage is usually a process of teachers assessing their own records and then completing a school survey form based on those records. This generally happens annually, although in the case of some records, such as attendance data or examination data, collection processes may occur more frequently. It is also a process of disseminating, collecting and verifying the return of school survey forms and other data records. For example, some data may come from sources outside the MoE, such as population data gathered through a national census, or payroll data gathered from a public service commission or similar government agency.

**(c) Technology**

Typically an EMIS application is in place at the data collection stage to enable the gathered data to be entered into a computerised system for collation, analysis and storage. This is usually a database kept at MoE head office, but can also be more decentralised, with survey returns being completed and returned by schools to a Provincial Office or other intermediary branch of the MoE. Many schools are also using computers to manage and store their own records. A more advanced EMIS may have online data collection options available.

**Strengthening the data collection stage**

As data quality at the data collection stage is principally determined by the information exchange between school record keepers and MoE data collectors, a practical means of enhancing an EMIS is to find ways of strengthening both the practice of record keeping at schools and the processes and tools involved in collecting those records from schools.

### **School record keeping**

The quality of data collected by MoE survey tools is entirely dependent on the quality of data kept at schools. A good starting point for improving the data collection process, and in that case the quality of the data gathered for the purposes of planning, is therefore to improve record keeping processes at schools themselves.

Record keeping at schools impacts upon data accuracy, timeliness and relevance. If school records are well organised, the accuracy of survey completion is improved: surveys are more likely to be filled in completely and without guesswork, and MoE data auditors will be able to verify the accuracy of school survey returns quickly by viewing school records. If records are structured along similar lines to the survey instruments themselves then the available information at the school will be directly relevant to the information required by surveys. Well managed school records also assist with timely completion and return of surveys, because they make it an easy task each year to complete the surveys.

There are several ways to improve record keeping at the school level to ensure that data collected from schools through annual survey forms and other means are of good quality. Schools can be provided with a standard tool for collecting and aggregating school-level data to ensure that enrolment data and teacher information are captured succinctly and accurately from year to year. The tool should match the content and structure of the MoE annual school survey form, so that completing the survey form each year is a simple task of transferring details from school records to the survey form. Providing such a tool also ensures that schools can maintain their own record of growth and changes at their institution over time.

To ensure that record keeping systems developed for schools are used effectively, it is important to train teachers in their use. Similarly, when the MoE school survey tool has been designed, a short training course in how to complete it should accompany its introduction to schools. Training minimises the chance that the tools will be misinterpreted or misused. Training programmes also create an opportunity to inform school-level data providers about the purpose of the data collection process and how the data they provide will be used. This will help to encourage ownership of the EMIS at the school level and gives data providers at

this level a better idea of the kind of information that can be available to them should they require it.

If training programmes covering school-level record keeping can be added to the curriculum at teachers colleges and universities, as well as teacher in-service training programmes, good record keeping practices in schools will be sustained into the future. These established training events are also opportunities to demonstrate how information flows through the national EMIS and how school data are used to support ESP development and implementation.

Ensuring that information produced by the EMIS feeds back to data providers also encourages ownership at the school level. When reports are being produced, sending data in meaningful formats back to the people who provided them in the first place will strengthen the EMIS in many different ways. First, data providers will know that they receive returns from the system they contribute to. Data providers will also be able to see how the information they contribute to the system is used, and how it is ultimately beneficial to both the system and themselves to provide quality data. Furthermore, if schools receive reports back from the MoE they will be better able to start using the information in their own strategic planning and development processes. A simple fact sheet summarising the school's data—in comparison to a local area average for example—will give planners at this level something to work with and more incentive to contribute to the system.

Reports also can be disseminated to communities via schools. In situations where community financial support for schools is essential for covering annual operating costs, providing information to communities is a good way to demonstrate that community efforts are worthwhile and are making a difference.

Supporting and assisting school record keepers also will enhance the quality and efficiency of collection processes. School record keepers need to have their time constraints recognised. If schools can be advised in advance that a survey will occur during a certain time period, then principals can plan for the event by making time available and scheduling other events around the survey. Busy times of the school year, such as beginnings and ends of terms, should be avoided as far as possible for collection processes. Similarly, school survey forms should be designed so as to reduce the amount of effort required to complete them.

Some facts about a school do not change from year to year, such as the size of the school site or the number of toilet blocks at the school. If known facts about a school that are unlikely to change annually can be pre-printed into school survey forms then the person completing the form will not feel that they are unnecessarily repeating themselves year after year. Recognising the time constraints on school record keepers and making efforts to reduce the amount of work required to provide information can encourage full cooperation with data collection processes because information providers will feel as though their role and needs have been recognised.

### **School survey tools**

In addition to solid record keeping practices at schools, the data collection process is dependent upon having effective data collection tools to transfer the information from its source to data managers and data users. Data collection tools also impact upon the accuracy, relevance and timeliness of information produced by the EMIS.

In order to gather accurate and relevant data, data collection tools need to be designed with the information needs of strategic planners and other education sector stakeholders in mind. This will ensure that the questions asked on the surveys will capture all of the information that is needed at the data analysis and reporting stages of the EMIS cycle.

For survey tools to gather data in a timely fashion, the physical timing of the survey needs to be considered. If information is required from the system annually at the time of budget production, then the whole cycle of survey distribution, collection and analysis needs to be complete before budgeting each year. The timing when information is needed in order for it to be current and useful should determine the timing of any regular data collection processes.

It is often difficult to achieve 100% survey returns from schools within the required timeframe for data collection. MoE data collectors will often have a difficult time gathering the final few outstanding surveys. Data collectors can be supported in various ways to assist with achieving 100% survey returns. They need to have adequate resources to make contact with non-responsive schools

through site visits, radio broadcasts or telecommunications. MoE staff, including senior officers, can demonstrate their support by encouraging school principals to comply with data collection efforts whenever opportunities arise through workshops, in-service and other training programmes or planning sessions. The requirement to complete annual school surveys can be included in the position descriptions of school principals or as key performance indicators during performance review processes. In extreme cases, penalties such as withholding funds or supplies can be applied to those schools failing to return surveys to MoE within required timeframes.

Data collection processes conducted by the MoE also should be well coordinated to ensure that multiple surveys are not being sent out each year by different divisions, with overlapping areas of inquiry. This is important for eliminating duplicated effort at the MoE, and is a more efficient way of using resources allocated to information gathering and research. Coordinating survey efforts also assists information providers at schools. If head teachers and principals are receiving several surveys a year from the MoE and other education sector stakeholders they will probably be less inclined to complete the surveys carefully, as they will begin to feel that they provide endless amounts of information with seemingly little result. Similarly, if it is possible to coordinate with other education sector stakeholders who might be conducting surveys, such as NGOs, donors, and other government agencies, benefits will be gained through information sharing and the more efficient use of scarce resources.

To maximise the quality of data gathered during the data collection stage of an EMIS, it is useful to focus efforts on improving record keeping practices at schools and ensuring the relevance and effectiveness of MoE survey tools.

## **Summary**

### **Ways to Strengthen the Function of the EMIS at the Data Collection Stage**

- Strengthen record keeping at schools
- Ensure teachers and principals are trained in record keeping
- In designing school record keeping tools and MoE data collection tools, bear in mind the need to make them translate easily to one another in both structure and content
- Ensure school teachers and principals have input into the design of both record keeping tools and school census survey tools
- Reduce the repetitiveness of school surveys
- Coordinate research activities at MoE to ensure schools are not receiving multiple surveys each year with overlapping areas of inquiry
- Schedule survey activities appropriately to ensure the information gathered will be available when needed, i.e. in time for budgeting processes
- Ensure data collection tools are asking the right questions to capture the information needed post-analysis
- Support data collectors in their activities by encouraging timely, accurate and comprehensive survey returns
- Include the completion of annual school surveys as a position requirement for school principals or as key performance indicators if a regular performance review process is in place.

## **Stage two: data treatment**

### **System**

#### **(a) People**

The treatment of data once they have been collected is often performed at the MoE by data managers, planners, statisticians or researchers.

#### **(b) Process**

Raw data need to be treated in order to be useful for planning and budgeting processes. They need to be summarised, categorised and interpreted. They also need to be verified and cleansed. Data treatment therefore involves twin processes of data auditing and analysis.

#### **(c) Technology**

There is often a computerised system, such as a database, to facilitate data entry and analysis. Data auditing processes will generally also employ communication technologies to follow up data providers to verify the information they have provided. An effective EMIS computer application will also incorporate data auditing tools to assist with verification and cleansing processes.

### **Strengthening the data treatment stage**

At the data treatment stage data quality is mostly affected by how effectively the data that have been gathered can be audited and analysed. Strengthening auditing and analysis processes that take place at the treatment stage will therefore have a great impact on the usefulness of the information produced by the EMIS for strategic planning and policy making.

#### **Data auditing**

Auditing data is necessary principally for ensuring the accuracy of information being used for strategic planning, but it can also have an impact upon whether or not good quality information will be available in time to be useful in planning processes. Data that are incomplete, inconsistent or contain major errors will

produce inaccurate information about the realities of the education system. Auditing data is important to ensure that people can have confidence in the information they are using to make decisions. The processes of checking the accuracy of available data can be time consuming so sufficient time needs to be allowed for it in order for good quality data to be available for policy making, budgeting and planning cycles.

The more complete a data set the more accurately results will reflect the reality of the education system. One first important step for cleansing and auditing information gathered at the data collection stage is therefore to check whether or not all surveys have been collected and included in the data set that will undergo analysis. In the case of data collection processes that aim to capture only a representative sample, it is still important to make sure the targeted sample area or population was comprehensively surveyed. In particular it is vital that no major sub-group within the education sector is under-represented.

Data auditing processes should also involve weeding out any obvious errors and inconsistencies in the data. There are several ways in which this can be achieved. First, data collection tools themselves can have consistency checks built into them to verify how accurately they have been completed by schools. For example, if a school survey includes a table to capture total school enrolment numbers, as well as tables to capture enrolments by class level, then the total school enrolment figure should match the combined total enrolments reported at each class level. A quick and effective means of checking whether surveys have been accurately completed is therefore to check through similar information reported in different sections of the survey to see whether or not it is consistent. An effective EMIS computer application will automate this process so that it can be done instantly for the whole data set.

Another way to check data for inconsistencies or errors is to show it to someone who is very familiar with the data in question and would therefore be able to spot information that is amiss. For example, MoE officers who are particularly closely involved in a particular sub-sector of the education system, such as primary schools or schools in a particular province or district, will most likely have used data from that sub-sector over several years. If those officers have an opportunity

to view data during the auditing processes they may be able to spot unusual findings straight away, on the basis on their prior experience and knowledge of the sector.

Data auditing is also about finding and investigating outliers, or results that seem unusual compared to the findings from the rest of the data set. Comparing results from individual schools against national, provincial or regional averages is one way to discover any outliers. Data that seem to be completely out of step with average figures may be incorrect or incomplete. They may have been entered incorrectly or they may have been reported untruthfully. In some cases outliers do not indicate inaccurate data, they may simply be exceptional cases. However, this is in itself useful information to have, as investigating an exceptional case will sometimes reveal success stories that can be replicated to produce successes elsewhere. In the opposite scenario, investigating an outlier may reveal severely disadvantaged groups in the sector that need to receive additional support from the MoE as a priority.

Data also can be checked for accuracy against other sources as part of the audit process. For example, teachers' reported salaries can be cross-checked against MoE teacher payroll data. Similarly, school site and infrastructure data can be cross-checked against information available at the national Ministry of Lands or equivalent agency. Historical data can also be useful for cross-checking data. Analysis of year-on-year trends may reveal anomalies or strange results occurring within a certain year that can then be investigated.

It is also a good idea, as part of the auditing process, to institute a practice of school site visits for a certain percentage of schools each year (selected at random) to verify that surveys are being completed accurately. The size of the sample of schools selected randomly for a site visit will depend on financial and human resources available to the auditing process. Even if it is a small sample, however, if it is truly randomly selected it will be useful for data auditing in two ways: first, from the results of the site visits (i.e. the extent to which schools are completing survey forms honestly and comprehensively), how accurately the rest of the schools are filling in their surveys can be inferred; secondly, the randomness of the sample will encourage schools to complete surveys properly in case they are audited.

To strengthen data auditing processes further, and therefore enhance data quality for strategic planning purposes, support should be given to the individuals who carry out those auditing processes. One key way in which data auditors can be assisted in their role is by ensuring that enough time and resources are allocated to this vital stage of the EMIS. Data managers will sometimes encounter feelings of irritation or annoyance from data providers, as they are seen to be ‘checking up’ on people or re-hashing the data collection process after it was thought to have been completed. Data managers can therefore be supported in their role by being given endorsement from senior MoE officers. If data providers know that the auditing tasks being undertaken by data managers are an important and necessary part of the information system, they will be more cooperative. Many education systems have inspectors or advisers who regularly visit schools. If these professionals are trained and given additional time for visits to verify data, it will reduce the need for additional resources.

It is not enough just to institute rigorous data auditing and cleansing processes; the processes employed should also be documented and made public. Adopting this practice will increase the confidence that people have in the body of data and therefore encourage them to make use of it.

### **Data analysis**

Data analysis is the part of the data treatment stage that converts raw data into useful information products. The people, processes and technology involved in data analysis impact on the accuracy, relevance and timeliness of information in several ways.

Analysing data involves grouping and summarising data as well as performing calculations on the data to produce statistics. Data analysis therefore has a huge impact on the accuracy of reports that are produced based on the gathered data. If data are analysed incorrectly using incorrect formulas or inconsistent processes of categorisation, the results that are reported will be flawed.

Data analysis processes will also affect the relevance of information being produced by ensuring that information reaches strategic planners and other sector stakeholders in formats that are meaningful and well-targeted for different

audiences. Thus the analyses performed on data need to group and summarise those data in response to stakeholder information needs.

Thorough analysis of data and its compilation into useful reports and information sheets take time. If raw data collected from data providers are to be converted into useful information that can be fed into strategic planning processes then sufficient time needs to be allowed for analysis to take place. If analysis is rushed, or skipped, data may be available in time for planning purposes but it will be less useful to planners if it has not been structured and organised properly.

When data managers plan how they will go about collecting and then processing education sector data, they need to know, in order to structure their activities effectively, what kind of end product is expected from them. It is impossible to design a survey without knowing what information is required by data users. Similarly, analysing data and sorting it into categories require first knowing what kind of reports are going to be useful. In order to support data analysis processes it is important therefore to provide data managers with clear objectives for those processes and ensure good understanding of what is required by way of reports and other information products. This information needs to reach data managers well in advance of data analysis processes, and ideally should be fed into data collection processes so that data collection tools can be designed to capture all of the detail that will be required at the analysis stage in order to produce the required reports.

Data managers often come to know the education system extremely well as they are constantly gathering and processing information from its sub-sectors. Frequently therefore data managers will come across useful, unusual or revealing facts and results in the data that may not have an obvious use or may not ever be requested. If data managers can have a clear and non-threatening path by which such items can be reported on or fed into policy making and planning processes, these novel findings will be more likely to come to light.

Similarly, data managers should have input into the creation of major statistical or information publications, as their experience in processing data will no doubt mean they are aware of several interesting ways in which the facts can be presented to illustrate different viewpoints.

At the data analysis stage, in order to enable a more accurate assessment of other results, it is useful to be able to separate out the results of those surveys that are likely to skew the data set. For example, if the high schools in a capital city are considerably larger and better equipped than those anywhere else in the country, it is useful to be able to display information about those schools separately from the information about other schools. Otherwise, national average enrolment rates, teacher qualifications or infrastructure figures could be skewed by the larger institutions' results and more interesting pictures about what exists outside of the capital may be obscured.

An effective EMIS computer application will also make the task of data analysis easier and more efficient. An EMIS application should be capable of aggregating and disaggregating data, performing calculations on the data set automatically, and comparing and cross-analysing schools data with other data from within the MoE and from other ministries and sector stakeholders. Not all data managers and data users have a background in statistics, and so a good EMIS computer application should be able to perform accurate statistical analyses for them.

At the data treatment stage, obtaining quality data that will be useful for strategic planning purposes essentially involves working with data managers to strengthen data auditing and analysis processes. In addition to instituting rigorous data auditing and effective analysis processes, it is important to make sure these processes are known to information users so that they can feel confident in the information they are basing their decisions on.

**Summary**

**Ways to Strengthen the Function of the EMIS at the Data Treatment Stage**

- Audit the data and make public the processes that were used to do so
- Support data managers in their role as data auditors by allocating appropriate time and resources to the audit process and by making it clear to data providers that the audit process is as necessary and important as all other processes in the EMIS
- Ensure data managers are clear on the objectives and requirements of the analysis being performed
- Ensure correct formulas and processes are used to make calculations
- Have an effective EMIS computer application to conduct analyses.

**Stage three: information production and dissemination**

**System**

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**(a) People**

Information users are a diverse group with diverse needs. This group includes MoE planners and policy makers, other government agencies, civil society groups, donor agencies, and data providers and managers. From the MoE perspective this is the stage of the cycle at which the quality of information available becomes most important for planning and policy making purposes.

**(b) Process**

At the information use stage of the EMIS several reporting processes take place. First there is, internally at the MoE, a process of reporting on data and disseminating information about the data analysis findings. Secondly, and generally concurrently, there will be processes of external reporting taking place to disseminate education sector information more broadly to education sector stakeholders outside of the MoE, such as other agencies of government, civil society groups and international donor agencies. Finally, the information use stage of an EMIS is about feedback cycles, including providing information back to

data providers and managers, and reviewing and gathering feedback about the collection and treatment processes in preparation for the next EMIS cycle.

### **(c) Technology**

At the information use stage a range of technologies may be employed to disseminate the information that has come out of the collection and treatment stages. The main technology involved will most probably again be the EMIS computer application that conducts data analysis and then produces reports in a variety of formats for the diverse audience of education sector stakeholders. Other technologies that may be involved in information use are communication technologies, such as radio or television, to disseminate and publicise the information that has come to light.

### **Strengthening the information production and dissemination stage**

The final stage through which information flows in an EMIS involves the production and dissemination of findings from data analysis, and acting on that information as it feeds into planning and policy making processes. Examining the ways in which reports are produced and information is disseminated at the data use stage of the EMIS cycle illuminates several means by which the utility of data can be enhanced for the purposes of strategic planning and policy making.

### **Reporting**

As noted earlier, relevant reports are reports that meet the various information needs of the many stakeholders in public education, and reflect the structure, content and priorities of the national education system and ESP. Reports will generally be accurate if they have been based on well audited data that have been analysed correctly. Ensuring the timely availability of reports supports strategic planning and so reporting processes need to be scheduled ahead of major planning and policy making cycles.

To improve the usefulness of reporting outputs for strategic planning purposes, it is important to make sure that a wide range of reports is available to information users in formats that target their particular information needs. Annual statistics year books provide a good overview of the whole education system but this should

not be the only way in which education sector data are available. Producing a suite of reports on the education system that might include, for example, summary fact sheets, detailed reports on different regions within the country, or different levels within the education system, maps, and operational level reports for individual schools and communities, will enhance the relevance to stakeholders of information produced by the EMIS.

It is also a good idea to make sure that information presented in reports is accompanied by interpretive remarks and explanatory notes. This will minimise the extent to which information that is presented is misinterpreted by information users who are unfamiliar with education sector data, and make it easier for information users to understand quickly the implications of the data they are being shown.

It is also important to remember at the reporting stage that information users will have both predictable and ad hoc information needs. It is vital therefore to have flexibility in reporting systems so that non-routine information requests can be managed or dealt with as well as more routine enquiries. Flexibility is also important for ensuring that reporting tools can grow and change with the education system, and reflect shifting priorities that may emerge from reviews of ESP implementation progress.

Similarly, information users should have the opportunity to make suggestions for and provide feedback on reports that are produced by the EMIS, to provide further assurance of the relevance of those reports to sector stakeholders. Reviewing reporting processes to incorporate stakeholder feedback will also reveal which reports are in high demand, and which, if any, are unused. Unused reports may be unnecessary, or may not be presenting information in relevant formats. They may be reports that are available but are not acted upon effectively. Conducting stakeholder feedback sessions and reviews of information usage can help to improve the efficiency and effectiveness of report production.

### **Information dissemination**

People will need to know what information is available in order to know what they can ask for. If an effective EMIS has not been in place before, or has not been

around for very long, it is likely that information users are used to having to make decisions based on intuition and experience. A well-timed launch or publicity event to encourage people to make use of the information available will encourage a culture of decision making based on EMIS information outputs. Inviting stakeholders to make use of information also encourages information sharing such that when education data need to be cross-referenced against other sources, those sources may be more amenable to sharing their data.

The flow of communication through an EMIS will also be more effective if systems are in place to ensure that relevant information gets to the right people. On the one hand this means creating communication channels between data managers and information users to ensure people know when and how to obtain the information they want. On the other hand it means keeping private and secure any sensitive or personal information that is not meant for public consumption. Putting in place clear procedures for giving out information will ensure that the right information gets to the right people when they need it and when it is appropriate for them to have it.

### **Summary**

#### **Ways to Strengthen an EMIS at the Information Production and Dissemination Stage**

- Promote availability of information and the nature of information available
- Target reports and other information to the audience
- Ensure data users have opportunity to provide feedback on information provided and feed their information requirements into the data collection and analysis stages
- Periodically review the reporting process to identify frequently used and unused reports
- Ensure a computerised EMIS includes flexible reporting formats
- Make use of available communication technologies to disseminate key facts more widely
- Restrict access to private or sensitive information.

## **Conclusion**

Reduced to its most basic elements, education strategic planning consists of an analysis of the present state of the sector, the articulation of a vision for the future of the sector, and the development of operational plans towards the achievement of the future vision. Through its impacts on national human resource development, an ESP will have implications beyond just the education sector.

A well functioning EMIS will support strategic planning by ensuring that analysis of the present state, and operational plans to guide the future development, of the education sector are based on timely, accurate and relevant information about the education sector. To improve data quality for planning purposes, it is useful to consider the various stages through which information flows in an EMIS, from the perspective of its human elements, processes and technology, to determine means of strengthening various aspects to improve the information flow.

An EMIS is an information system and therefore should facilitate better communication and information dissemination within the education sector. In an effective information system, data collection, analysis and reporting processes work in a cycle to produce information in response to the needs of various stakeholders. The cycle needs to create opportunities for input by stakeholders, from data providers to strategic planners. The people who contribute to the system should also be able to benefit from the information it produces. The processes involved in capturing raw data and turning them into useful information for strategic planning should be developed with the needs and constraints of the people involved at each stage in mind.

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## 8

### **The role of assessment in educational planning**

*Uabila Fasi*

In order to understand the role of assessment in educational planning, it is important that planners first understand the principles of assessment and how assessment data and information are obtained. They have to understand the processes involved in assessment as well as the various assessment activities and their characteristics, and how they are related to the data and information that are released for public consumption. They must look behind the data and they must understand, or at least be aware of, the different stages the data went through before assuming their final form as information. Then, and only then, will planners be able to make informed, valid and meaningful interpretations of the information that subsequently lead to good decision making and planning.

This chapter is in two parts. The first focuses on assessment and planning, how they are related and how they fit in education. The challenges education faces today in relation to assessment and planning will be discussed and an attempt will be made to address the current situation in the Pacific region. The second part deals with examination marks. The meaning(s) of the 'mark' awarded at the end of a course will be discussed and analysed in order to assist educational planners in the interpretation and usage of examination and other assessment information.

### **Assessment and planning**

In order to appreciate fully the relationship between educational planning and assessment, we should be fully aware of the reasons why we plan and why we assess. If we know the reasons why we plan, then we should be in a better position to find ways to make our plans effective and our objectives achievable. Similarly, knowing the reasons why we assess gives us a better understanding of the principles of assessment and the various ways and techniques of assessment. Further, planners will appreciate the meanings behind the marks and results awarded at the end of the course, and thus they will be assisted by them in making informed decisions during the planning process.

#### *Why do we plan?*

In all education systems, there is a continuous effort to improve the quality of education. There is an ongoing drive to devise educational programmes at all levels to meet the rising demands for relevant education and to combat contemporary problems that threaten the future livelihoods of school-age citizens. Appropriate and effective educational programmes are also desperately needed to address social, economic, moral and spiritual issues that are so prevalent in all Pacific island nations today.

Careful and effective planning is therefore necessary to improve the quality of education. Planning also is needed to monitor educational quality. Good planning practices will enable the system to detect whether the standard of education, as shown by various indicators, has improved, has deteriorated, or is not changing at all. Governments view the performance of their education systems as strategic to economic and social development. As such, planning is essential for the process of putting relevant educational programmes in place with the goal of improving quality. With careful and proper planning, quality can be achieved as well as being monitored to ensure that it is maintained.

Today, there is a growing demand from all sectors of society for increased monitoring and accountability to improve educational quality. People need to know how well their children are doing and how well schools and systems are doing in achieving anticipated educational outcomes. Students' achievements need to be considered within the context in which learning takes place, in order to

provide a fuller picture and make more sense of the multitude of factors that influence the quality of education. Educational indicators need to be identified and validated before information pertaining to educational quality can be gathered and analysed. Students' achievements and levels of performance are the chief indicators of educational quality, and the way they have been used, in the form of assessment results, has been the subject of public debates and controversy. Since assessment provides the vehicle for measuring and monitoring student achievement, it is vital that any planning on matters relating to quality of education should incorporate the data and findings revealed by assessment.

This leaves planners with challenges in their endeavour to capture educational quality. Questions that planners may need to address include: What does quality education mean? What do we need to do to improve the quality of education? How do we monitor the quality of education over time?

#### *Why do we assess?*

The traditional role of assessment is to measure students' achievements in terms of the curriculum requirements, mainly for the purposes of ranking and selection. Assessment has been known as one area of education that is resistant to change because it has always been difficult to move away from its traditional roles. The current global trend is towards an approach where assessment is becoming more and more an integral part of the teaching–learning process. This entails significant changes not only in the way in which the assessment process is carried out but also in the way the results are being used.

An impact of the global movement is the redefinition of the purpose of assessment as 'assessment for learning' rather than the traditional purposes of 'assessment of learning' and 'assessment for ranking'. The emphasis here is more on using the assessment information to improve student learning, rather than to rank and discriminate between students.

It is imperative that planners and decision-makers are fully conversant with the assessment process and the roles of assessment. They need to know and understand what is involved and what the various components of the assessment data represent. The formative and summative certification and quality control

roles of assessment need to be understood, to avoid using the wrong data for the wrong purposes, which may provide misleading information not only to parents and other users of assessment results, but also to planners. Assessment has the dual role of providing evidence about the status of student learning and acting as a regulatory process with the purpose of informing stakeholders about how well students learn and how effectively teachers teach (Pongi, 2004).

Formative assessment provides feedback to students and teachers about ongoing progress in learning. Results are used for improving teaching and learning either through modifications to the teaching practice and programmes or through some intervention measures to facilitate and enhance the learning capability of the learners. Summative assessment is used when there is a need to provide summaries of the nature and level of students' achievements at various points in their schooling. This usually takes place at the end of a course of study or when the students leave school. The certification role of assessment involves providing a summary of students' achievements for the purpose of selection and qualification (Pongi, 2004). Assessment also provides information and evidence for judging the effectiveness of schools and of the system as a whole. This way, it acts as a quality control mechanism.

In most education systems the summative and certification roles are dominant. This is to be expected of systems where opportunities are limited and selection and screening for various purposes play major roles in determining the effectiveness of the functions of the system. Formative assessment is not systematically practised, in the sense that most systems have not recognised and implemented it nationally but still adhere to summation and certification as the official evidence of education. With the recent advent of assessment for learning there are indications that formative assessment will be widely accepted as a more reliable and valid way of recognising students' achievements as well as improving the quality of education. Central to all education systems are its students, and the state of any system is reflected in the quality of students it produces. The role of assessment therefore in the 'production' of students is of utmost importance. This, then, is the source of the need to be cognisant of assessment processes and the principles represented by different assessment data.

It would make the job of education systems, and particularly of educational planners, much easier if there were clear objectives about what to plan for. Planners also need to know whether their objectives are achieved. If quality education is the objective, and improvement in school quality is a necessary component of development strategies for the future, then obviously the indicators of such planning are the students, teachers, schools, and the system as a whole. Traditionally, a good student is defined as one who does a good job at high stakes examinations. A good teacher is someone who can teach students to do a good job in these examinations. A good school is one with a high ‘pass’ rate at high stakes examinations, and a good system is one that can do a good job in screening people.

These definitions have influenced the direction of educational planning for a long time. Improving pass rates and the selection of a small proportion of the student population to elite educational institutions continue to be the ultimate goal of planning. Little consideration is given either to the actual learning processes or to the quality of teaching. Good teachers are supposed to produce good examination results, and planning favours schools with high pass rates. The current global drive to develop forms of assessment for learning that focus on the ongoing monitoring of student learning in order to address their weaknesses, nurture their strengths, and enhance the teaching–learning processes in a formative way, is an area that planners should directly address.

### **Assessment and quality education**

It is evident that the quality of education in the region is a concern despite efforts at international and regional levels to address the issues associated with educational quality improvement. It is not always easy to identify what the problems are, and unless they are identified it would be almost impossible to come up with solutions. There is therefore a need for education systems and planners in the region to take heed and come up with ways of identifying key problem areas as well as realistic strategies to address them.

Assessment is one mechanism used in monitoring the quality of education. But the success of such monitoring attempts depends largely on what we mean by ‘quality’. Quality needs to be clearly defined and its characteristics identified. Student

achievement is a key indicator of educational quality, and as such, priority should be given to how well students perform and how effective schools and systems are in achieving intended outcomes. Student achievement should be considered in the context of the environment in which learning takes place. The community, the nature and resources of the school, the teachers, the learning resources, the curriculum and support, and teaching methodologies are some of the contextual elements that should be considered when monitoring and assessing students' achievements.

Performance in high stakes examinations is often taken as an indication of quality. But this should not be confused with real performance. Real performance is the actual normal everyday performance of the student. The weaknesses and strengths elicited through formative activities reveal the true level and standard of performance as opposed to the 'quick fix' results obtained in high stakes examinations. In this way, students can be assisted and problems remedied according to the outcomes of the assessment activities. Assessment provides the mechanisms and platform for measuring and monitoring student achievement over time. To understand and evaluate the quality of education, we need not only quantitative measures but also a more vivid picture of the unique and complex character of the educational systems.

Planners therefore need to come up with specifics on how to improve or achieve quality, and to propose initiatives that would enable the issue of educational quality to be measured and monitored solely for the purpose of improvement. Assessment, when implemented properly, could provide such initiatives by focusing on a student's true performance and how to improve learning and teaching rather than on the politics of ranking and comparing relative performance of students, schools and systems. Such traditional, narrow approaches to assessment are still the stumbling blocks to effective planning. The misconception that the pass rate in high stakes examinations reflects quality is another old-fashioned belief that contributes to the continuing resistance of some people to the new approaches in assessment.

Proponents of the modern view of assessment, a view that *all* planners should seriously consider, advocate that assessment is an integral part of the teaching–

learning process where the emphasis is on using assessment information to improve student learning. It is also a regulatory process to inform and assure stakeholders of how well students learn and teachers teach. The information provided by assessment is crucial in developing strategies to improve the quality of educational programmes, and hence the quality of education as a whole.

### **The current situation in the Pacific region**

The following discussion provides a summary of the current situation in the region as far as assessment, its roles and its usages are concerned. First, there is limited information on the quality of student learning achieved by both teachers and the education system in general. This leads to a lack of understanding of the link between assessment and better learning, particularly on the part of teachers, who may be unaware of the specific weaknesses and strengths of students in relation to the expectations of the curriculum.

Secondly, education authorities lack information on teaching and learning in the early years. This has led to the absence of established strategies to monitor students' achievements throughout primary schools.

Moreover, the heavy emphasis on high-stake examinations encourages rote learning of examinable areas at the expense of other curriculum areas. Because teachers are expected to prepare students for these examinations, there is little concern with whether or not 'deep' or 'real' learning has taken place in the process.

Matching what students have achieved and what the curriculum expects is also a problem. Many students fail to achieve the outcomes specified in the curriculum. And yet they are allowed to be socially promoted by being moved up the ladder without achieving the curriculum outcomes.

A public perception that is difficult to dislodge is the perception that assessment is a process for ranking students to facilitate selection. Related to this is the misconception that the results of students' performance in high-stake examinations are a good indicator of the standard of the education system and the quality of schools.

Planners and educational authorities therefore need to look for alternatives to high stakes examinations and focus on quality of students' true performances rather than relative performance. They need to realise that assessment has the ultimate purpose of improving learning and teaching, and hence the quality of education. There is also a need to understand which students learn best under what conditions, and what problems they have and in what area. The question to ask is 'what is better' rather than 'who is better'. Assessment should be viewed as providing information for monitoring how changes to any input in the education system affect student achievement and performance. This needs improving expertise in assessment to provide valid and reliable information about student achievement. Without expertise, teachers and planners will continue to use the wrong methods and data for the wrong purpose.

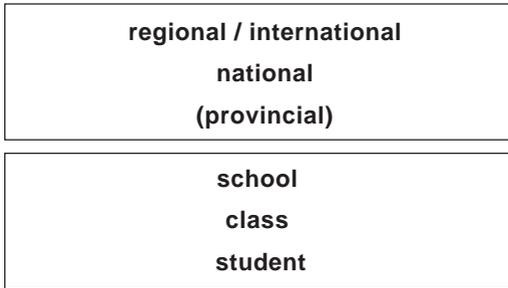
#### **Examination marks: what is behind the numbers?**

Education planners and decision makers base their work on the final results reported when the examination results are released. But these marks, in numerical form or letter grades, are produced through a process intended for national or regional (or international) ranking and selection, and therefore the marks have gone through processes designed for those purposes. They reveal nothing about the quality of education or the true performance of students or the actual quality of learning and teaching. Planners and policy makers base their decisions at the national and regional/international levels of reporting. What they need to do in order to make valid and appropriate planning decisions is to interrogate and investigate those marks to reveal the true performance of students. They need to know something about the quality of the data they are using.

They should first ask questions about the validity and reliability of the data. They need also to ensure that the data are accurate and relevant to their planning tasks, which means they have to avoid using data produced for different purposes. If they are planning for quality education, they should use data produced for that purpose, and not results produced for ranking, selection or any other purpose. To do this, they need to go down to the school level, the class level and to the individual student level. This is where formative assessment and assessment for learning come in. The data from such assessments are valid, reliable, accurate and relevant as far as true performance is concerned.

Figure 8.1 shows the levels of reporting that planners need to be aware of when collecting data.

**Figure 8.1** Levels of mark reporting



In figure 8.1, the data available for planners are in the upper box. The levels in the lower box are those from which they need to obtain data in order to make informed, relevant, valid and reliable decisions and planning.

Consider the following situations:

*Situation 1* The cut-off mark for entrance to a certain prominent high school increased from 315/400 in 2002 to 356/400 in 2003.

*Situation 2* The overall mean for Mathematics in the School Certificate examination has dropped from 35 to 31.

*Situation 3* The percentage of students ‘passing’ the national examination increased from 25% in 2001 to 35% in 2002.

*Situation 4* The top student this year in the national examination is from School X, and his total mark is 489/500. Last year the top student was from School Y, and her total mark was 470/500.

The situations above were taken from real examination results. The conclusions drawn by decision makers were as follows:

*Situation 1* The quality of primary education has improved.

*Situation 2* Students these days have poor mathematical abilities.

*Situation 3* This is a reflection of the improvement in teachers' performance and qualifications.

*Situation 4* The quality of education has improved, and School X is a better school than School Y.

These examples demonstrate the danger of drawing conclusions from processed assessment data contained in official reports, and the myths that result from such unvalidated interpretations. Take Situation 1 for example. The purpose of the examination was for ranking and selection, and marks are good only for those purposes. The increase in the cut-off mark could be attributed to any number of reasons. Two obvious reasons are: the school may have reduced its intake, or the examination papers may have been easier. But the figures in the official reports say nothing about these factors.

Similar arguments can be made about Situation 2. One cannot justifiably say anything about the mathematical abilities of students without having in-depth knowledge and understanding of the learning and teaching processes that actually went on in the classroom. The drop in overall mean could have been a result of a faulty examination paper, in which case students were not at fault. Alternatively, it could have been an after-effect of social promotion that resulted in a very bottom-heavy cohort that pulled down the mean. There are many more possible causes, but they are all masked by the single mark or grade reported at the end, and can only be unmasked by tracking the marks down to school and individual levels.

The conclusions for Situations 3 and 4 are clear cases of unsubstantiated, unreliable, invalid and misleading statements. A 'pass' is determined by the authorities. Marks have been subjected to multiple stages of manipulation, and therefore have been transformed substantially from their original form. The

increase in pass rate is a function of the selection and ranking processes, and not of the quality of teaching.

In Situation 4, the performance of a single student cannot be used to make conclusions about a whole school or a whole system. But these were what decision-makers said and what planners used. These erroneous and uninformed actions give more reasons to interrogate and analyse the data presented in official reports before using them for decision-making purposes. It is equally important that relevant information is made available before further decisions are made.

### **Conclusion**

The functions and purposes of assessment need to be understood by educational planners. The processes involved and the characteristics of assessment data should also be considered before decisions are made. They must ensure that the data and information are real, valid, relevant and reliable. The purpose for which the marks are to be used must be clearly defined, and the appropriate form of the mark used. Planners must look behind the data in official reports to obtain the most appropriate information for their tasks at hand. When higher quality data are used, the quality of planning will improve, resulting in education of a higher quality and citizens of an enriched standard.

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**Educational planning in the Pacific  
a way forward**

*Sen'ula Johansson Fua*

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So, what does it all mean then? How do we move the discussion forward from conceptualising a Pacific way of planning to operationalising the principles of planning, the benchmarks, and the lessons learnt from the case studies? And how do we maximise data utilisation in educational planning? Where do we go from here?

This book has reviewed several key ideas about educational planning in the Pacific. The intention has been to present a Pacific way of planning in education that will bring together what is best of Pacific and global practices. Throughout this exercise the premise has always been that Pacific values are central to the process of educational planning. Without this, educational planning in the Pacific will remain foreign and will fail to benefit children of the Pacific—who, after all, are intended to be the first rank of beneficiaries.

### **What does it all mean?**

In the opening chapters Bob Teasdale and Priscilla Puamau presented exciting and thought provoking ideas about educational planning in the Pacific. Reflections brought forward in these two chapters question old notions of planning and assumptions about existing educational structures.

#### ***'A Sea of Islands'***

Bob Teasdale entreats a careful and critical questioning of colonial assumptions about the Pacific and its educational needs. He recalls Hau'ofa's (1993) concept of 'a sea of islands' emphasising a holistic approach to thinking about Pacific people and their endeavour to share the ocean that is within—'Oceania is us. We are the sea, we are the ocean' (ibid.: 16)—*the ocean within us*. And the ocean that is of them—'people from the sea, kakai mei tahi' (ibid.: 8)—*people of the ocean*.

This concept of a 'sea of islands' brings to light several of the key ideas that the PRIDE Project wishes to encourage in our thinking about educational planning in the Pacific. In thinking about the '*ocean within us*' it recognises Pacific people's strong sense of spirituality, sense of belonging and sense of connectedness with nature. These beliefs, particularly spirituality and connectedness to nature (ocean and land), are the core of Pacific people's identities. It means that Pacific people through their identification with nature are connected to their ancestors who have come before them and their children who will come after them. This sense of identification reflects a way of thinking that is interconnected rather than fragmented, where knowledge is passed on from one generation to another. And in the process of transmission, knowledge evolves, thereby recognising each generation's contribution to weaving this Pacific mat of knowledge. In such a way of thinking there is recognition of a unity of knowledge. This way of thinking is broadened by the subsequent concept of '*people of the ocean*'. The strong sense of connectedness to nature is enlarged to include a sense of connectedness to all other people who share the same ocean. It is an engulfing and inclusive belief about being, and about being with others. It recognises the centrality, for Pacific people, of social relationships. Such social relationships exhibit all that is significant to Pacific cultures—predominantly values of respect and reciprocity.

When Bob Teasdale brings to mind Hau'ofa's concept of our 'sea of islands' he argues for Pacific educational planners to centre their planning in Pacific epistemologies—Pacific ways of thinking and knowing. Interestingly enough, as he points out, current global thinking is increasingly being driven by post-structuralism and post modernism. A Pacific way of thinking recognises the relativity of knowledge, the reality of the spirituality, and more holistic and integrated ways of thinking and knowing. Similar concepts can be identified in Hau'ofa's 'sea of islands' and it is within this point of overlap that staff of the PRIDE Project hope that educational planners may construct a Pacific way of planning that captures the essence of Pacific core values and best practices that can be integrated with current global thinking.

### *Principles and benchmarks*

To begin this obviously challenging task, participants from 15 Pacific countries came together during PRIDE's first regional workshop in Lautoka to work on principles they thought would be pertinent to educational planning in the Pacific. Additionally, they finalised a list of draft benchmarks that they agreed were essential to constructing strategic plans for Pacific education systems.

Priscilla Puamau in her chapter presents a comprehensive summary of agreed principles of planning, as well as the benchmarks constructed during the workshop. I will not dwell much on this list as she has already raised several thought provoking questions regarding assumptions about the consultation process, use of foreign consultants and donor assistance. However, I would like to draw attention to several key principles of planning—namely values, vision and leadership—comment on what they mean, and suggest implications for educational planners to ponder upon.

### **Values**

Much discussion has centred on principles of planning and Pacific values, but what do values mean? Why is it important that the principles of planning be based on Pacific values? Values and principles are concerned with people's belief systems, cultural identities, ideas and behaviours that are intrinsically desirable. While the subject of human values is often left to theologians and philosophers

to ponder, it exists within every realm of our daily lives. Our values define how we see the world, how we relate to those around us, and how we perceive ourselves in our various social roles. Subsequently, certain values come to define social, political and economical structures in our broader societies. Education is one such organisation that is loaded with values, from its organisational structures, to its classroom practices, to the curriculum that we teach our children.

It has been identified in chapter 3 that such values as respect, reciprocity, spirituality, importance of land, environmental and social sustainability, relationships, participation/consultation, capacity building, resourcefulness, accountability, practical and context-specific training, consensus, ownership and good leadership are pertinent to educational planning in the Pacific. The list may seem exhaustive, but the components vary from personal and social values such as respect and spirituality to more organisational values such as accountability and capacity building. Similarly, the list includes traditional Pacific core values such as respect and reciprocity as well as emerging global values such as sustainability and accountability.

Taufe‘ulungaki (2002: 19) argues that one of the core challenges for Pacific education today is to clarify:

[t]he value systems which underpin political, economic, educational and civil institutions, which largely determine their visions, structures, processes, programmes and outcomes.

The value systems that have come to define education in the Pacific are based largely on western philosophies of education. The value dissonance that exists between western-derived values in our educational structures and our Pacific social values continues to foster inequalities and marginalisation in our society. Research recently conducted on the decision-making processes of Tongan principals highlights the value dissonance that exists between organisational policies and those espoused by the community (Fua, 2001). Taufe‘ulungaki (2002) argues that this value dissonance needs to be resolved. She points out that continued efforts to introduce good governance and better accountability, to create more

‘democratic’ organisations, to ensure sustainability and more resources, and to develop appropriate policy frameworks, will remain ineffective, as these activities are simply perpetuating the very system they try to improve.

It is with this in mind that, as educational planners and policy makers, we come to think more critically about the values that underpin our educational structures, processes and programmes.

There is an understanding that Pacific cultures to a large extent share common core values. Such core values include relationships, respect, reciprocity, participation, resourcefulness and the value of land. There is also the understanding that while Pacific people share common core values, there is variation in how each value is espoused through each culture. What is not always recognisable, however, is that there are value disparities within cultures and, more importantly for this discussion, there is divergence between societal values and organisational values. Findings from recent research on educational administration in Tonga illustrate tensions and conflicts that are directly caused by the value differences that often go undetected in our Pacific organisations (Fua, 2001; 2003). There is a need for further articulation of espoused social values and values within educational organisations. Further to this, it is essential to recognise that in any effort to align organisational values with societal values, the very process of value transfer should be reflective of Pacific epistemologies.

### ***Vision and leadership***

What is a vision worth pursuing? King Taufa‘ahau Tupou I of Tonga once said that his ‘people will perish for the lack of knowledge’. Tupou I envisioned a learned people for his country. Over a century later, Tonga has successfully entrenched formal learning into its culture. Schooling has become an intrinsic value in Tongan society. Parents will sacrifice meagre financial resources to send their sons and daughters to the best schools in Tonga and to overseas universities to gain *‘ilo* (knowledge) and become *poto* (skilled). King Tupou I’s vision has been realised.

Undoubtedly, others will ask ‘what type of knowledge has been achieved?’ And ‘at what socio-economic and political cost?’ Without doubt, there have been numerous problems along the way within the education system as well as in communities. Issues of assessment, curriculum, teacher education, administration, financing and others abound. But, at the end of the day, Tongans have cultivated a desire for *‘ilo* and to be *poto*.

Priscilla Puamau, in her chapter, listed ‘Strong, objective and visionary leadership’ as one of the 12 principles of planning put forward by PRIDE participants. Participants at the Lautoka workshop recognised the importance of leadership to the process of planning and consequently the role that leadership plays in ‘the shaping of a vision for the organisation’. However, the principle of visionary leadership did not transfer over to the benchmarks listed in Puamau’s chapter. There are several reasons why visionary leadership should be further articulated and made deliberately apparent within any form of strategic planning.

Much of the literature on visionary leadership can be traced back to the ‘Effective Schools Movement’ in the 1970s. The argument behind this movement is that much of a school’s success depends on the principal’s leadership and attitudes about learning. Recent research, however, brings the focus to the visionary attributes of leaders and describes them as facilitators of the school community’s ‘collective vision’ (Rossow & Warner, 2000: 11). Visionary leadership is concerned with recognising and reflecting on the challenges of organisational change as well as embracing a learning culture. Visionary leadership is about critical reflection on what is real and projecting a better reality. Crucial to this type of leadership is the notion that the leader possesses a clear philosophical educational platform (Rossow & Warner, 2000). The visionary leader must be clear about his/her personal and organisational vision, without which visionary leadership cannot be attained.

Is this the type of educational leadership we envision for our Pacific schools? If this was what we meant by ‘visionary leadership’ then we need to clarify what are our schools’ *collective visions*. The first step to such a task would then be for educational leaders to clarify their own *personal vision* and subsequently an *organisational vision* for the various organisations in their education system.

Vision building is an essential task to claiming ownership of any strategic plan. It involves not only the recognition of personal and organisational vision but also the collective vision of the entire community that has vested interests in the school. Central to vision building is consultation with stakeholders both within and surrounding the organisation. Nowhere else in the process of strategic planning is consultation more important than in the process of vision-building. When stakeholders—internal and external—recognise the vision as part of what they desire, then ownership of the plan begins to take place. When parents are convinced of the direction taken in their children's education, they will support the plan at whatever cost.

However, the failure to build a clear collective vision further perpetuates one of the key struggles for Pacific education—'lack of ownership by Pacific people of the formal education process' and consequently the 'lack of a clearly articulated vision for Pacific people' (Taufe'ulungaki, 2002: 2). Taufe'ulungaki goes on to argue that:

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because they [Pacific people] do not own the process, educational visions and goals tended to be defined by external sources, as is the case today and has been since the introduction of formal education. (2002: 2)

If we as educators are serious about taking ownership of our education systems as well as our strategic plans, we need to have a clearly articulated vision for our children and their learning in the Pacific.

Added to this, we also need to have a clear articulation of what educational leadership means for us in the Pacific. If we accept that vision building is central to ownership of a strategic plan, then I would argue that leadership is the essential criterion for the achievement of the plan. There are several reasons why we should be more earnest in our endeavour to be clear in our definition of educational leadership for the Pacific.

First is our context for educational leadership. Most descriptive of our times is the demand for change—social, political and economic—from local, regional and global forces. The context within which educational leadership is being practised

is, more than ever before, in a constant state of flux. The list of benchmarks and principles that has been constructed for strategic educational planning in the Pacific clearly reflects the various forces that are demanding our attention, especially the need to build pride in cultural identity while striving to teach skills for life and work in a global world.

On another front there is the push to align education strategic plans with national development plans as well as with regional and international conventions such as *Education for All (EFA)* and Millennium Development Goals (MDGs). There is also the need for capacity building while remaining fully cognisant of the limited budgets of local Ministries of Education, when their priorities are often far removed from the professional development of current staff. The continuing brain drain of capable teachers to other shores also is a continuing challenge. Similarly, there is the push for access and equity for special needs students as well as other minority groups, yet the reality is that even with the current school population, solutions to issues of access and equity have yet to be fully realised.

As educators we do not have to analyse the list of principles, nor the benchmarks we have constructed, to know the reality of our schools. Parents are demanding greater involvement in the education of their children. With increasing school fees, parents are also demanding an education that is relevant and worth their investment. Community expectations are also changing, demanding greater moral leadership from teachers and principals. Correspondingly, the nature of teaching and educational administration are also changing; while Ministries of Education are demanding greater ‘professionalism’ from teachers, incentives such as salary and other benefits are not at all forthcoming (Fua, 2003). And at the centre of all these concerns are the students. The students of today’s Pacific schools are not the same as those of 10 or 20 years ago. Television, internet, media, travel, satellite channels and a whole host of other global influences are all competing highly successfully with parents and teachers for the attention of our children and youth.

For educational leadership to be contextual to the Pacific, the changing social, economic and political dimensions of our educational organisations and our schools need to be understood. The changing nature of the educational terrain demands that educational leaders—more than ever before—be convinced of their

vision and their leadership. It is the commitment of Pacific educational leaders to their vision that will mediate global influence and protect local cultures in our schools. In today's schools, educational leaders have to rise to the challenge and be the 'gate keepers' of our children's futures.

Secondly, there is an urgent need for the development of Pacific educational leadership. Our educational leaders can no longer stand submissively while foreign consultants come and go, nor can they allow donor agencies to continue directing the next agenda. Neither can they just 'talanoa' by sitting around the kava bowl and paying lip service to 'doing it the Pacific way'. Our educational leaders have to know more about the changing educational terrain at all levels, local, regional and global.

We can begin by asking what we mean by Pacific educational leadership. In my view it is fundamentally about relationships. Results from a recent study on Tongan educational leadership showed that:

Principals' conceptualisations of educational leadership are not only defined by their past socialisation processes but also in response to contemporary social and economical changes within Tongan society. Results of the study show that incumbent principals are changing their leadership practices, although slowly; there are changes in relationships with stakeholders and in decision-making processes . . . principals are recognising that it is within their relationships with stakeholders that they can draw strength to influence their leadership practices. (Fua, 2003: 353)

If we look back at the values that have been identified as those of the Pacific, we can clearly identify the centrality of 'relationships' to Pacific society. Similarly, if we recall Hau'ofa's (1993) 'sea of islands' it likewise speaks of the importance of relationships for Pacific people. Perhaps, then, in our attempt to define Pacific educational leadership, be it at school or Ministry level, we may begin by thinking about relationships of principals and leaders with students, teachers, parents and other stakeholders.

Without doubt, much thinking and research need to go into finding conceptualisations and practices for Pacific educational leadership. Pacific academics must work closely with practitioners to develop this field. Areas such as problem solving, decision-making processes, communication strategies and

relationship building demand all of our attention. Through the development of Pacific educational leadership, we will know more about leadership behaviour and, more importantly, gain significant insight into the mind of the Pacific educational leader. By taking a cognitive perspective to studying educational leadership in the Pacific, we will gain an understanding of why educational leaders make certain choices and use particular decision-making processes, and how they process information. Additionally, from a cultural perspective, we can gain greater insight into the tensions that exist within our education systems, tensions that reflect our struggle to merge local realities with global demands. By developing educational leadership through cultural perspectives we will also know more about the use of Pacific values and epistemologies that will guide our schools. I strongly believe that by equipping our educational leaders with the ‘right’ tools, we will be putting them in a better position to meet local demands as well as respond to the onslaught of globalisation.

### **From conceptualisation to operationalisation**

There is a saying in Tonga: *ko e lau pe ia* (it is just talk). How do we move from just talking about strategic plans to making them a reality? How do we move from conceptualisation to operationalisation of Pacific educational strategic plans? How do we ensure that our plans are reflective of the Pacific and that they are not just another imported crate of cheese from New Zealand, Australia or Europe?

### ***Fiji and Papua New Guinea Case Studies***

Earlier chapters by Epeli Tokai and Uke Kombra present case studies of recent educational planning in Fiji and Papua New Guinea. Each shows a response to unique demands within the particular country. The Fiji study reflects the Ministry of Education’s attempt to recapture a plan that had been hijacked by politicians. Fiji’s case reminds us of the various forces that can play havoc with even the best laid plans. The size and diversity of Papua New Guinea always present the local educator with interesting challenges, challenges that other Pacific Island states can look to for insight in addressing their own problems. Uke Kombra’s chapter provides a comprehensive outline of an approach to provincial planning for Papua New Guinea, and much can be learnt from it.

The case studies gave me an opportunity to reflect on the operationalisation of the espoused principles of planning and subsequent benchmarks in the planning process. There are several points I would like to highlight from the case studies. Central to both of them is the need for consultation, and I wish to probe this a little further. Uke Kombra in his chapter also talked about monitoring and evaluation, and I would like to reiterate the importance of this phase in any planning cycle. I would also like to add to the discussion two other points for consideration: learning organisations and building relationships.

### *Communication strategy*

If there is one concept that is evident throughout the discussion on principles of planning and the development of benchmarks, and reiterated in the case studies, it is that of consultation. 'Consultation' seems to be in vogue at the moment. The process of consultation seems to be the justifying mechanism for 'democratic process', 'ownership' and 'doing it the right way'. Unfortunately, as evident in the case studies and in other discussions in this book, consultation seems to occur either at the very beginning of the process of planning, or sporadically at various stages during it. The consultation process seems to be mainly with stakeholders outside of the organisation, with less consideration given to internal stakeholders.

My concern here is that we talk about consultation and all its supposedly 'saving graces', but we do not factor in 'consultation' as a systematic component of planning. By developing the process of consultation as a component of planning, we give due recognition to the importance of information usage within organisations as well as internal and external communication. Consultation when regularised, focused and fully incorporated into the administration of the organisation can be articulated through a communications strategy.

A communications strategy is a way to utilise and systemise information gathered through consultation and other forms of communication, in order to operate a plan. To operationalise a plan, to turn the plan from paper into activities, it is essential that an organisation set up a communications strategy. A communications strategy will not only breathe life into a plan but, more importantly, will manage the flow of information, which is the lifeblood of any organisation. Without information people are not connected to organisational visions, plans and goals,

and consequently are disconnected from the organisation. Information can be empowering, thus encouraging engagement, loyalty and commitment, but it also can be disempowering, resulting in disengagement, detachment, indifference and lack of commitment.

The setting up of a communications strategy should be seen as one of the initial phases of a plan, thereby providing direction for remaining activities. A communications strategy can be closely aligned with the vision and guiding values and principles of the overall plan. The communications strategy should clearly recognise the different levels of communications that operate within a given organisation: external, internal, informal, formal, horizontal, vertical, explicit and implicit. The communications strategy also should recognise the different tools and modes of communication used within the organisation as well as the different venues where communication takes place. With a comprehensive communications strategy tailor made for it, an organisation will be able to gather relevant, timely and often hidden information.

A communications strategy is to be differentiated from the gathering of statistical data as described in earlier chapters by Rebecca McHugh and Uhila Fasi. These data are particular to quantitative analysis of the outcomes of the education services that are provided. The communications strategy suggested here is particular to the everyday operation of the organisation. It will give educational administrators insights into processes that eventuate in outcomes based data.

Information gathered through a communications strategy will add depth to the analysis of end result data collected about enrolment, assessment, retention and teacher movement. With a well set up communications strategy, trends in teacher movement and student retention as well as other movements within the organisation can be detected earlier. With a well-defined communications strategy an educational leader will know how to resolve a conflict *before* he/she receives a letter of resignation from a teacher, at which point there is little he/she could do.

One of the principles listed in earlier chapters is the need for our educational plans to be flexible and realistic. I think that with a clearly defined communications strategy information can be filtered through to inform educational planners and leaders on what is real and what is not within their plan. Further to this, educational

administrators may also get a sense of how flexible they may need to be in response to emerging issues. A well-defined communications strategy will help keep the plan flexible, real and sensitive to a changing terrain. It will not only inform planners of how the plan is being implemented, but it will also inform educational leaders on many fronts, particularly in problem solving and making decisions. Informed leaders make informed decisions.

### *Building relationships*

Crucial to the setting up and operation of a communications strategy is the building of relationships within and outside the organisation. We of the Pacific do not have to look too far to see the benefits that are brought about when relationships are harmonious within our extended families and communities. When relationships are in agreement, cultural and familial responsibilities and obligations are easily met. In our social relationships, our values of reciprocity, love, respect and tolerance are clear guidelines. Admittedly, there are times when relationships are strained and decisions are questioned, but ultimately, through dialogue, consensus is reached. They say in Tonga that the wealth of a person is his/her *kainga* extended (family); it is from them that support and loyalty are drawn. The importance of relationships to Pacific culture lies in the value of social capital over economic capital.

Earlier in this chapter I talked about Hau'ofa's (1993) concept of a 'sea of islands' that also speaks to the common ocean that we share as people of Oceania. The 'sea of islands' concept also promotes the value of relationships for Pacific people. I have also proposed that we consider 'relationships' as one of the fundamental concepts of educational leadership in the Pacific. In raising the importance of relationships, I am also proposing that we consider building organisational relationships as a key tool in operationalising our strategic plans.

Transferring the fundamental conceptualisations of societal relationships into our organisations can help build sound organisational relationships into our education systems. Here I am proposing that we transfer the values that underpin societal relationships—such as reciprocity, love, respect and tolerance—into our education organisations.

It is a common practice within Tongan organisations that staff members collect a certain amount of money from every pay cheque to contribute to a social fund. This fund is used when a member of staff has a funeral or a wedding, so that staff can contribute. In Tongan funerals it is common to see a whole organisation presenting gifts of tapa, mats and money to a fellow employee. On such occasions the organisation becomes another social unit as it assembles behind a long line of familial clans to pay tribute.

Through this one example, we can see how members of an organisation observe the values of reciprocity, love and respect in a cultural and social context. This also speaks to the fluidity of movement between the structures of our organisations and our social units, a movement that we as educational administrators are not always aware of and unfortunately, others discourage altogether. By recognising this movement we not only build relationships within the organisation but also build bridges between organisational context and societal context, thereby minimising the gap between these two structures. When we consciously move towards building authentic bridges between organisations and wider social units we do not have to spend so much time talking about ‘consultation’. Rather, through the process of weaving relationships between organisation and community, we complete a mat upon which we will later sit down to hold dialogue. By using guidelines from our social relationships to inform us in building our organisational relationships we will be engaged in blending the local and the global and consequently making our schools into Pacific schools.

Further to this, by closely aligning our organisational relationships along the guiding principles of our social relationships we are also exhibiting ‘pride in cultural identity’. We cannot seriously expect our children to take pride in our cultural identity by singing national anthems and raising flags! We have to lead by example and we can begin that by honouring our culture in our organisations.

The communications strategy proposed above hinges on well-articulated organisational relationships. When relationships within any organisation or any social unit are in agreement, information is shared more easily and quickly. Similarly, when relationships are in harmony, the consultation processes, decision-making processes and problem-solving processes are more efficient and effective.

Relationship building within organisations is crucial to the vision building, organisational analysis, implementation, monitoring and evaluation phases of any plan. Building organisational relationships that reflect our cultural values is an investment that cannot be ignored or forgone.

*Learning organisations*

Central to this book is the search for Pacific approaches to educational planning. In implementing this approach we maintain Pacific cultures while we select best practices from a global perspective. At the centre of this approach is a greater realisation of our Pacific cultures in our organisations.

Epeli Tokai in chapter 4 presents a framework for planning based on a cyclical process of continual planning, implementation and evaluation. This strongly suggests a need for a learning organisation constantly to upgrade, develop, re-evaluate and adapt to the changing nature of its environment. Similarly, Uke Kombra suggests further research in order to understand other variables in educational planning better. Through his own research, Uke Kombra has been able to define specific variables essential to educational planning at provincial level for Papua New Guinea. Tokai and Kombra both have presented chapters that demand our educational organisations to be constantly improving and seeking out new ways of doing things.

I commented earlier on the characteristics of visionary leadership, stressing that it involves encouraging learning organisations. Similarly, I have also proposed that we develop our understanding of educational leadership in the Pacific. Along similar lines, I also put forward the proposal that we develop our understanding of educational organisations in the Pacific. To do this we need to think of our organisations as learning organisations, thus encouraging growth, development and most importantly, research. Thus, in operationalising the plan, there is need for careful documentation by using a communications strategy to document processes and evaluate our own progress. A learning organisation would also promote professional development at all levels, as well as a strong commitment to capacity building. Consequently, the educational planner in operationalising the strategic plan needs to think of cultivating organisational cultures and the

provision of an appropriate organisational climate that will encourage organisational learning. When an organisation promotes the building of relationships and develops well-defined communications strategies that are founded on visionary leadership, it thereby encourages learning cultures within organisations.

### *Monitoring and evaluation*

In recent years debate over educational policies has moved from input- to outcomes-based policies. The growing focus on outcomes policy comes from an increasing concern with gaps and mismatches between investment in education and producing skilled people for the labour market (Mingat, Tan & Sosale, 2003). For us here in the Pacific, our limited resource base, as well as the growing demands from donors to display evidence of investment, has forced educational planners to plot in some form of indicators for the evaluation and monitoring of their plans.

However, the question that we are now left with is how do we monitor and evaluate our plans? Uke Kombra's chapter outlines problems with monitoring and evaluation and has suggested ways of addressing these problems. Kombra has addressed these problems thoroughly. I would, however, like to raise a few additional points in order to illustrate linkages with the discussion earlier in this chapter.

I suggest that with a well-defined communications strategy and a predisposition towards developing a learning organisation, the task of monitoring could be carried out more effectively and efficiently. With a clearly articulated communications strategy, information—both informal and formal—can be channelled back into the monitoring mechanism more fluidly and regularly. Monitoring then becomes part and parcel of the general administration of the plan, as it provides regular feedback. It is anticipated that when monitoring becomes part of the administration, it becomes less burdensome for staff members. Similarly, with the task of evaluation, when the communications strategy is well articulated and regulated, it can provide timely and well-defined information for evaluative purposes. It is also important to evaluate against organisational vision and to maintain observation of the changing nature of the educational terrain. Further, it is also important that the evaluation process is sensitive to outside changes and thereby informs the organisation in a timely manner.

The success of gathering authentic, reliable and timely data for monitoring and evaluation tasks again hinges on well-defined communications strategies and organisational relationships. These two variables rest on the shoulders of an informed educational leader, who has articulated these concepts in the strategic plan.

### **Where do we go from here?**

Unlike my seafaring ancestors who conquered Oceania by reading the stars and ocean currents, I am not sure where to go from here. But I am convinced that with further research we will once again be able to read the stars and feel the currents thereby once more designing our own course of action.

We need to further our understanding of Pacific educational leadership, perhaps not just from a cognitive perspective but also from cultural and historical perspectives. We certainly need to equip our educational leaders better for today's demanding educational terrain. And we cannot do this by mere wishful thinking, or by asking donors to supply another workshop.

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We also need to know more about the 'colours of our organisations'. In order to make our schools reflective of Pacific values we need to understand our educational organisations—perhaps the last of the colonial legacies. How can we make our educational organisations Pacific organisations? How can we bridge the gap between societal cultures and organisational cultures? I have suggested a closer alignment of societal relationships with organisational relationships. But much needs to be done before existing tensions between organisations and communities can be eased. How can we construct learning organisations that will be responsive to the changing nature of our times? And how can we maintain cultural development in light of the push for economic development?

Undoubtedly, more questions need to be asked and much work remains to be done. What this book has provided is a collection of thoughts on Pacific educational planning that will help us to keep pushing forward our ideas about educational planning in our region. This book is certainly a useful start to a discussion that will continue to grow as we learn more about leadership, administration, organisations and planning, and about ourselves as people from a 'sea of islands'.

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## Appendix A

### List of participants, first PRIDE Project regional workshop, Lautoka, Fiji – September 2004

Countries	National Coordinators	Data Managers
Cook Islands	Ms Repeta Puna Director of Planning and Policy	Ms Maria Enetama Statistics Officer
Federated States of Micronesia (FSM)	Mr Aier Willyander Post Secondary Administrator	Mr Burnis Danis Assessment and Evaluation Specialist
Fiji	Mr Filipe Jitoko Deputy Secretary for Education (Special Projects)	Ms Betty Kalou Assistant Senior Education Officer
Kiribati	Mr Matana Anterea Education Officer, Primary and Junior Secondary	Ms Era Etera Education Officer (Statistics)
		Mr Nauto Tekaira Senior Education Officer (Tertiary/Non-Formal Education)
Marshall Islands	Mrs Glorina Harris Actg Assistant Secretary for Elementary Education	Mr Stanley Heine Testing Specialist
Nauru	Mr Jarden Kephass Secretary for Education	Ms Tryphosa Keke Acting Principal
Niue	Ms Tiva Toeono Director of Education	Mr Kennedy Tukutama Administration Manager
Palau	Mr Emery Wenty Director of Education	Mr Raynold Mechol Chief, Division of Research and Evaluation
Papua New Guinea	Mr Uke Kombra Assistant Secretary – Planning, Facilitating and Monitoring Division	Mr Pala Wari First Assistant Secretary Policy and Planning, Research and Communication

*Educational planning in the Pacific*

Samoa	Mrs Doreen Roebeck-Tuala Assistant Chief Education Officer for Curriculum, Material and Assessment Division	Mrs Lufi Taule'alo Assistant Chief Executive Officer Schools Operation Division
Solomon Islands	Mrs Mylyn Kuve Director, Planning Coordination, Research Unit	Mr Ben Karai Principal Planning Officer
Tokelau	Ms Lili Tuioti Education Advisor	Ms Hana Atoni Data Officer
Tonga	Mr Tatafu Moeaki Deputy Director of Education	Ms Pelenaise To'a Education Officer
Tuvalu	Ms Katalina Taloka Senior Education Officer	Ms Valisi Tovia Curriculum Officer
Vanuatu	Mr Antoine Thyna Policy Analyst	Ms Fabiola Bibi Senior Statistics Officer

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## Appendix B



### Participants

#### The PRIDE Project regional workshop,

Lautoka, Fiji, 1–8 September 2004

**Back row (L–R)** Leonitasi Taukafa (PRIDE), Henry Elder (USP), Filipe Jitoko (Fiji), Pala Wari (PNG), Titilia Uluiviti (PRIDE), Vasiti Nalatu (USP), Emery Wentry (Palau), Uhila Fasi (SPBEA), Tatafu Moeaki (Tonga), Monica Fong (PIFS), Nauto Tekaira (Kiribati), Matana Anterea (Kiribati), Priscilla Puamau (PRIDE), Seu'ula Fua (USP), Betty Kalou (Fiji)

**Centre row (L–R)** Jolden Jonnyboy (FSM), Jarden Kephas (Nauru), Libby Cass (PRIDE), Aier Willyander (FSM), Maria Enetama (Cook Ids), Pelemase To'a (Tonga), Raynold Mechol (Palau), Repeta Puna (Cook Ids), Ben Karai (Solomon Ids), Epeli Tokai (PRIDE), Lufi Taule'alo (Samoa), Lili Tuioti (Tokelau), Doreen R. Taula (Samoa), Eve Coxson (USP), Stanley Heine (Marshall Ids), Burnis Danis (FSM)

**Front row (L–R)** Antoine Thyna (Vanuatu), Tryphosa Keke (Nauru), Fabiola Bibi (Vanuatu), Mylyn Kuve (Solomon Ids), Uke Kombra (PNG), Bob Teasdale (PRIDE), Rajendra Singh (MoE), Anirudh Singh (USP), Shrinivasiah Muralidhar (USP), Ana Taufe'ulungaki (USP), Kennedy Tukutama (Niue), Glorina Harris (Marshall Ids), Era Etera (Kiribati), Tiva Toeono (Niue), Hana Atoni (Tokelau)