

**Sectoral Activities Programme
Education sector action programme (EDAP)**

***Teachers for the future:
Meeting teacher shortages to achieve
Education for All***

**Evaluation Report
September 2006**

Background

A proposal for an education sector action programme (hereafter EDAP, or the programme) on the theme of *Teachers for the future: Meeting teacher shortages to achieve education for all* was first made to the Committee on Sectoral and Technical Meetings and Related Issues (STM) at the 286th Session of the Governing Body in March 2003.¹ The STM reviewed the proposal and recommended that the Governing Body approve the programme subject to its finalization following tripartite consultations in 2003.² On the basis of the requested consultations, including with UNESCO and the Organization for Economic Cooperation and Development (OECD), the Office modified the proposal, which was subsequently reviewed in detail at a Sectoral Steering Group meeting to finalize programme orientation and details in February 2004.³

The EDAP programme design focussed on bringing together government ministries of education and labour, teachers' unions, national employers and representatives of private schools, and other education stakeholders, to investigate and better understand the causes, dimensions and the actual or potential impact of teacher shortages, especially in the framework of international efforts to meet Education for All (EFA) goals by 2015. On the basis of decisions taken by National Steering Groups (NSGs) involving the ILO tripartite constituents as decided by the ILO Governing Body, a national research effort on these questions was expected to be carried out, including analysis of the results and the formulation of policy solutions – a national strategy or action plan - on how to reduce or eliminate shortages so as to realize educational access and quality for all learners. A major value of the programme design was expected to be the direct involvement of teachers' organisations, employers and representatives of private schools in decisions which could lead to significant education reform, applying ILO principles of social dialogue in the process.

The ILO programme was intended to be a contribution to the realisation of the international EFA effort and the Millennium Development Goal (MDG) number 2. By encouraging the strengthening or creation of social dialogue mechanisms in education on a broad range of issues affecting the teaching profession, the programme was designed to improve civil society involvement in education reform as advocated by the 2000 Dakar Declaration and Plan of Action, thereby enhancing the chances for sustainable reforms.

Major issues to be addressed in the action programme countries include:

- Levels and relevance of initial teacher education
- Provision of more universally accessible, continual professional development
- Recruitment and balanced deployment of teachers

¹ GB.286/STM/1, Appendix 1

² GB.286/16, paragraph 32 (a)

³ EDU/SPM/2004/5

- Raising salaries from poverty levels (in some countries) and making them competitive in relation to jobs with similar qualifications in a context of severe budgetary and fiscal constraints
- Improving incentives for rural areas to attract better teaching candidates and motivation to work in disadvantaged areas
- Provision of minimum teaching support infrastructure
- Resolution of gender imbalances in teaching
- Addressing the impact of HIV/AIDS on teachers and schools.

How to institutionalise meaningful social dialogue between educational authorities (public and private) and teachers' unions, which facilitates and encourages positive and sustainable education reform constituted a common issue cutting across countries with differing socio-economic levels.

The Office understood that all countries involved in the programme, ranging from middle-income countries with some involvement in OECD activities to very low-income countries, did not face the same problems.⁴ Chronic teacher shortages have existed for decades in many poor countries, which combined with lack of basic teaching and learning conditions, have led to excessively large classes, high drop out rates, denial of even minimum access, especially for girls and children in rural regions, and generally poor educational quality. High demographic growth rates in many of these countries continue to outstrip the recruitment of teachers, many of whom additionally do not meet minimum qualifications standards, thereby replicating poor teaching and learning conditions in schools. Fiscal and budgetary constraints mean that teachers are paid low salaries and few incentives to work in rural and disadvantaged areas. One of the consequences envisaged for study and policy options in certain African countries was the policy of hiring under-trained and low-paid "contractual" teachers due to budgetary constraints and EFA pressures, thereby undermining teacher professionalism and education quality. In such countries, teachers are generally considered to have low morale and motivation, have a higher than expected rate of absenteeism in some cases and increasingly seek to avoid work outside of urban centres. Low motivation undercuts performance, and reluctance to work in rural areas increases the urban/rural divide in educational access and quality.

In other participating countries, the programme needed to respond to more targeted challenges: shortages in certain key subject matters important to increased national development, such as sciences, mathematics and information and communications technology (ICT) skills; the challenges of qualifications recognitions and mobility of teachers in large federal States or in the context of substantial curricula reforms in countries undergoing transition towards more modern systems; the impact of HIV/AIDS or gender imbalances in teacher employment and distribution; or the means of institutionalizing already existing social dialogue for sustainable reform decisions.

⁴ OECD countries were not included. In these countries, the ILO participated as an observer in the OECD programme on "Attracting, retaining and developing effective teachers" managed by the OECD Directorate for Education, 2003-2005. In so doing the Office sought ways to establish partnerships between OECD and action programme countries to draw on this experience.

The programme design called for a second phase of work: regional or in one case national policy dialogue forums involving a balance of governments, teacher unionists, private employers and other educational stakeholders. The forums were designed to share the results of the national research assessments, together with ILO background documents, the provisions included in the international normative instruments applicable to teaching personnel⁵, and other analysis and good practices brought by participants. By sharing information on causes, innovations and “what works or does not work” to improve the status of teaching and reduce shortages, these forums were expected to help participating countries to understand how challenges and obstacles could be overcome through different policies, legislative and other measures in countries with similar socio-economic/cultural traditions and education systems.

To further enhance the knowledge sharing and policy options to be applied for sustainable change in line with the programme’s stated objectives the Office proposed to prepare a global report in 2006 for submission to the ILO Governing Body, the CEART and all member States. The report would provide a further basis for participating countries to assess their own national action, and serve as a major international analysis of challenges, successes and reforms needed to reduce worldwide teacher shortages as part of the EFA effort. The Office also committed to establish a programme Website for information sharing among participating countries, international sectoral constituents and the general public.

Purpose and scope of the evaluation

The purpose of this report is to provide information for an evaluation of the EDAP, taking stock of its implementation in relation to programme design and objectives drawing lessons for use in deciding on its possible continuation, and necessary modifications if it should continue. The report may also serve as a comparative means of making decisions regarding other action programmes implemented as part of the Sectoral Activities Programme.

The scope of the report is the EDAP in all its phases from initial design and approval in 2003, through its inception in 2004 to the present. The scope of the report includes: programme objectives and indicators; actions taken by the main sectoral constituents at international level, principal partners and actors at national level represented by the National Steering Groups (NSGs) established to direct programme activities, participants at regional forums, ILO programme staff at headquarters and ILO regional and sub-regional staff; and the outcomes of these activities. Overall, the exercise seeks to evaluate the programme’s impact, actual and potential, in terms of change in line with ILO strategic objectives, notably respect for fundamental principles

⁵ The ILO/UNESCO Recommendation concerning the Status of Teachers, 1966 - previous policy recommendations from ILO education sectoral work and the recommendations of the Joint ILO/UNESCO Committee of Experts (CEART)

and policies at work for teachers, with a focus on strengthening or creating effective social dialogue in education, and impact of any such changes on educational quality.

Methodology employed

Objectives

The EDAP had the following objectives:

- (1) Social dialogue in education is strengthened by the creation of bipartite or tripartite NSGs at national level to direct the programme, identify policy options, and follow-up;
- (2) A national assessment report coordinated or prepared by the NSG helps constituents and other education stakeholders to better understand the causes, dimensions and the impact of quantitative and qualitative teacher shortages on the EFA and MDGs;
- (3) Based on the national report countries transform some of the policy options into reforms by way of legislative, administrative or collective bargaining means;
- (4) Participating countries engage in sub-regional policy dialogue forums with tripartite constituents from a larger group of countries in each region, to share knowledge from national reports, good practices, and international technical expertise and standards;
- (5) ILO prepares a global report on the programme theme and facilitates information sharing through a programme Website.

Indicators

The following indicators were developed to measure achievements:

- (1) Social dialogue: NSGs function during the whole programme's timeframe;
- (2) National assessments and policy options: NSGs produce national assessment reports on the programme theme based on a common conceptual framework provided by the ILO and recommendations on policies and actions to address one or more of the four ILO strategic objectives;
- (3) Some of the policy options are transformed into legislative or administrative measures or provisions of collective bargaining agreements in three to four countries by the end of 2007;

- (4) Some countries not participating as core countries in the programme nevertheless participate in a sub-regional forum to exchange experiences and benefit from the work of the core countries;
- (5) Some of the countries participating in sub-regional forums follow-up by establishing NSGs or their equivalent to continue work on the programme theme by means of social dialogue;
- (6) The Office produces a global report on the programme theme within 30 months of the programme's commencement;
- (7) The Office enhances international information exchange through a programme Website and other forms of information sharing among participating countries.

Countries covered

Core participating countries which agreed to establish NSGs and initially committed to producing a national report on the programme theme were the following:

- *Africa (English-speaking)*: Lesotho, Mauritius, Mali, Nigeria and South Africa
- *Africa (French-speaking)*: Niger, Senegal
- *Caribbean*: Dominica, Trinidad and Tobago
- *Latin America*: Argentina and Chile
- *Eastern Europe/Central Asia*: Bulgaria

Additional countries participating in tripartite regional or sub-regional policy dialogue forums to share experiences and practices in the programme's second phase were the following:

- *Africa (Southern African forum)*: Angola, Botswana, Democratic Republic of the Congo (DRC), Malawi, Mozambique, Namibia, Swaziland, Tanzania, Zambia and Zimbabwe
- *Latin America*: Brazil and Mexico
- *Caribbean*: 11 Caribbean countries in addition to Trinidad and Tobago

Information sources

The Office addressed questionnaires⁶ to chairpersons of seven NSGs in May 2006, comprising a mix of generic questions common to all action programmes and other questions specific to the EDAP, in order to determine outcomes and satisfaction in each country based on the assessments of the principal national partners. The Chairpersons were invited to share the questionnaire with other members of the NSG, requesting them to collectively prepare a response or to send their responses separately to the Office programme coordinator. Three NSGs of participating countries (Bulgaria, Mauritius, and Nigeria) responded to the questionnaires. Following discussions with the major constituent groups represented in the steering group (tripartite for Bulgaria and Mauritius, bipartite – Ministry of Education and Labour and the teachers' union – in the case of Nigeria), the NSG Chairpersons sent to the Office the views expressed in the responses. The consensus views from these responses have been incorporated as appropriate in the findings, conclusions, recommendations and lessons learned.

Because of the limited number of responses to these questionnaires and the imprecise nature of some of the information provided, and given the large amount of information available by other means, the major source of information for this self-evaluation is a desk review by the EDAP programme staff based on all correspondence, missions, NSG meeting reports, participation in regional forums and other activities.

Review of implementation

Programme start-up

Despite initial approval of the programme and its theme in 2003, implementation of programme activities did not begin prior to a decision by the Governing Body at its 289th Session in March 2004, on recommendation of the STM,⁷ that oversight of the action programmes at the national level would be the responsibility of tripartite national steering groups (NSGs). In the case of education, where governments were the major employer of teachers in almost all countries, the Governing Body agreed on a compromise decision whereby the national steering groups would be joint, with significant private sector participation, and if private employers participated, they would be full participants.

In the meantime, the Office had sent letters of enquiry to nearly 140 ILO member States informing them of the programme and inviting their consideration of involvement in the action programme. By May 2004, Ministries of Education and/or Labour from

⁶ Appendix 1

⁷ GB.289/14

more than 30 governments had responded with expressions of interest. In response to follow-up letters from the Office setting out conditions for participation, including agreement on NSGs, governments of twelve member States confirmed their interest to participate by September 2004. During this initial phase of expression of interest, employer organizations in candidate countries were invited by the Employers' Group of the Governing Body to indicate their interest to participate, and those in seven of the confirmed countries responded favourably.⁸ At the same time, the Workers' Group, following consultations with the international organizations of teachers – Education International (EI) and the World Confederation of Teachers (WCT), both of whom also consulted closely with the Office – proposed one or more teachers' unions in each of the countries to participate in the NSG.

Parallel to the consultations with constituents, the Office initiated an internal consultative process with Directors and other staff of regional and sub-regional offices in order to establish programming support for the efforts of NSGs once established. This effort was particularly important in view of the large and geographically dispersed nature of the programme, and the fact that the opportunity to integrate planning with regional and country programmes established during an Office-wide programming meeting for the 2004-2005 programming cycle held in Geneva in the autumn of 2003 had passed by the time the EDAP got off the ground. As a result of these consultations, focal points among sub-regional Office staff were appointed to cover ten of the twelve initially participating countries.

The process of consultations to confirm interest and establish NSGs resulted in the launching of groups in a first meeting chaired by the ILO in the twelve countries between October 2004 and February 2005. Already at this stage, or as a result of the first meeting, two of the joint NSGs⁹ decided on their own and subsequently informed the Office that they had taken the initiative to invite representatives of private school management or employers to join the NSG, thereby transforming them into tripartite NSGs. Initial programme activities thus had begun by February 2005 in twelve member States, directed at national level by nine tripartite and three joint NSGs, in accordance with the decisions of the ILO Governing Body.

As the process of consultations on steering evolved, the Office developed a conceptual framework to guide national assessment according to the programme design. The conceptual framework recommended that a national report treat the following major subjects in separate chapters:

- *Context of the national education system:* demographics/demand, financing, governance and teacher qualification/competency requirements
- *Composition of the teaching profession:* numbers by qualification, gender, age

⁸ Chile, Dominica, Mauritius, Niger, Senegal, South Africa, and Trinidad and Tobago

⁹ Argentina and Bulgaria

and geographic distribution, numbers/structure/impact of “para” or “contractual” teacher schemes, percentage accessing professional development and retention, deployment, and national or regional mobility trends

- *Teacher candidates, recruitment, education and professional development:* profiles, weaknesses and strong points in teacher candidates, initial teacher training, professional development and assessment
- *Employment, careers, teaching and learning conditions:* recruitment, induction and deployment, career structures (with special attention to gender and HIV/AIDS issues), remuneration/material incentives, teaching and learning conditions
- *Social dialogue and participatory decision-making in education:* information-sharing, consultation and negotiations/collective bargaining mechanisms and structures
- *Policy Recommendations, national strategies*

As explained at the launching of each NSG, success in working to a common conceptual framework would enhance the information sharing aspects of the programme, as countries could better assess comparable information at later stages to help in their policy formulation. At the same time, amendments to the conceptual framework were incorporated as the result of NSGs’ evaluation of their national specificities and needs during this phase of programme work. These amendments are noted in the revised conceptual framework following the last of the initial NSG meetings.¹⁰

National steering groups and reports (Phase 1)

NSGs were launched at initial meetings as follows:

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|---|--------------------------------------|---------------|
| - | South Africa, Lesotho and Mauritius: | October 2004 |
| - | Niger, Senegal and Mali: | November 2004 |
| - | Argentina and Chile | November 2004 |
| - | Dominica and Trinidad and Tobago: | December 2004 |
| - | Bulgaria: | January 2005 |
| - | Nigeria: | February 2005 |

Initial reports of these first NSG meetings are available on the programme Website¹¹, created at the beginning of the programme. The initial meeting reports from participating countries indicate they met regularly and with high levels of participation. After the

¹⁰ Appendix 2

¹¹ <http://www.ilo.org/public/english/dialogue/sector/ap/educat/private/index.htm> (Participant information page, which is password protected; access to this restricted site is available on request to the education sector specialist: rattree@ilo.org)

initial meetings, the Office received fewer formal meeting reports but was informed of work being carried out by the NSGs in the majority of the countries through regular correspondence.

The correspondence and contacts with Office focal points in sub-regional offices covering these countries indicate that they progressed at various speeds and by different means to produce the national assessments and draft policy options which constituted the core activities and objectives of the programme's phase 1.

Exceptions to the good progress towards programme objectives nevertheless emerged within a few months of the NSG start-up in several countries. Two participating countries (Dominica and Mali), which had launched an NSG and agreed on the conceptual framework for a national report, did not follow through despite repeated requests for information from the Office, both headquarters and relevant sub-regional offices. No substantive responses to Office contacts were ever received from the NSG or any of its constituent members after the initial NSG meeting. Representatives of the Employers' and Workers' groups¹² were asked to help restore communications, but their efforts also failed to produce a response. As far as the Office is aware, neither country completed a national report nor continued in social dialogue efforts that were a central feature of the programme.

Two other countries (Lesotho and Trinidad and Tobago) also began social dialogue in the form of NSGs established on a bipartite (Lesotho) or tripartite (Trinidad and Tobago) basis, but after the initial two or three meetings respectively, the activities ceased for several months.

In the case of Lesotho, the secretary of the NSG informed the Office that difficulties had emerged regarding capacity of the partners to meet and complete agreed activities due to other commitments. The NSG did manage to complete a report for submission and discussion at the phase 2 sub-regional policy dialogue forum in December 2005, though the report only dealt with some of the aspects of the conceptual framework agreed at the initial meeting. Though details are not clear based on the available information, there seems to have been an obvious human resource capacity problem, particularly within the Ministry of Education, which was engaged at the same time in a parallel project on rural teachers financed by the World Bank. The Office's proposal to support the Lesotho NSG's work with modest technical cooperation funds in line with support to other NSGs where requested was not taken up during this period.

In Trinidad and Tobago, the NSG was confronted with two hurdles within months of its initial creation. A decision by the Ministry of Education (MOE) to temporarily disband the teacher professional development unit that had been the locus of decision-making and technical support to the programme was later followed by the tragic illness and subsequent death of the NSG Chairperson from the MOE. Though the Office

¹² For the Employers, the International Organization of Employers (IOE) in the case of Dominica and for the Workers, EI, whose affiliates were members of the NSG in both countries

financially supported consultancy work on a national report, the lack of coordination meant that information on the various parts of the report generated by the NSG members, the necessary analytical work and consensus derived from NSG reflection on the results of research and suggestions for policy options came to a halt for nearly one year. Due to diligent liaison work by the ILO office for the Caribbean in Port of Spain, and a headquarters mission, the NSG was re-established under a new Chair (the former Vice-Chair, the President of the teachers/ union, T&TUTA), oversaw the completion of a draft report and participated in a phase 2 regional forum held in Trinidad and Tobago in April 2006. The draft report is still under development, in part awaiting final comments from the Office, but is expected to be completed soon.

In Senegal, the NSG carefully developed a set of research tools to prepare a national report, but encountered difficulties in mobilizing the necessary funds to complete the work, despite initial support from the Office and promises of support from one bilateral donor with strong interest in education development issues in the country (the Canadian development agency, CIDA). At the time of writing of this report, the Office is requesting an update on the status of developments and a new timeline regarding completion of the phase 1 work.

In the other seven countries, national reports were produced and presented for discussion at regional or national policy dialogue forums as follows:

- Mauritius, Nigeria and South Africa: November 2005
- Argentina (initial draft) and Chile: November 2005
- Bulgaria: December 2005
- Niger (initial draft, subsequently updated)¹³: April 2006

The reports were prepared in different ways: directly by the members of the NSG; by smaller working groups of the NSG, with or without assistance from a hired consultant; or by a consultant with guidance and criteria from the NSG. ILO regular budget EDAP funds were used to support the work of consultants where requested, though because of the large number of participating countries, the amount of these funds were limited in each country. NSGs contributed considerable human and in some cases financial resources to this work. South Africa for example mobilized a large amount of funds from the sectoral education and training authority to complete and publish the national report, and drew on parallel work by other bodies looking at the human resources and working conditions in the country. Chile produced a complementary national study with projections on the supply and demand of teachers.

Coverage in the reports varies from very extensive, treating in depth all subjects of the conceptual framework, and often containing relevant statistics (notably in Argentina, Bulgaria, Chile, Niger and South Africa), to a more selective style focusing on very specific aspects considered important for national policy, as in Lesotho and Nigeria. Mauritius based its report largely on measuring teacher satisfaction or dissatisfaction with

¹³ As Niger's work is linked to that of Senegal, a sub-regional forum involving the two countries and potentially others in the region has not been organized yet pending completion of work in Senegal.

teaching conditions. Niger separately measured stakeholder appreciation of the education system, especially regarding access and quality. Nigeria paid particular attention to the complexity of teacher qualification recognition and supply across state boundaries in this large federal State. Together, the reports provide a rich source of comparative information for use in preparing the global report foreseen in the programme (see below for more details) and for the 9th Session of the Joint ILO/UNESCO Committee of Experts (CEART).

Policy dialogue forums (Phase 2)

In cooperation with the NSGs of host countries, and with financial, logistical and technical support from ILO regional and sub-regional offices, tripartite regional policy dialogue forums were organized in Southern Africa and Latin America by the ILO, and a national forum was held in Bulgaria. The Commonwealth Secretariat organized another regional policy dialogue forum on programme themes in the Caribbean with ILO support. The meeting featured a modified tripartite composition.

The Southern African Policy Dialogue Forum on Teachers for the Future was co-hosted by the South African NSG and the ILO in Pretoria, South Africa in December 2005 for countries of the Southern African Development Community (SADC) plus Nigeria. As noted above, ten SADC countries other than the core programme countries participated, including representatives of teachers' organizations from all countries, and employers' organizations from those countries which expressed an interest to participate. After examining the work done by the four programme countries, experiences from other countries and the view of international and regional experts, the meeting adopted *The Pretoria Declaration on Teachers*¹⁴ comprising a set of recommendations on policies for decision-makers in all 14 countries represented in the Forum.

In Latin America, Brazil and Mexico participated with the programme countries Argentina and Chile in a Latin American regional policy dialogue forum co-hosted by the Chilean NSG and the ILO in Santiago, Chile. It adopted a consensus statement (*Declaración de consenso*)¹⁵, which highlights the main findings from the national assessments and experiences and suggests activities to continue the work begun by the NSGs.

In the Caribbean, the ILO supported the organization of a regional policy dialogue forum on the programme issues organized by the Commonwealth Secretariat and the Government of Trinidad and Tobago. This forum was inspired by the ILO-organized policy dialogue forum in southern Africa, and included ILO technical inputs and advice on composition of the meeting. Representatives from twelve countries, including representatives from teacher unions and employers' organizations from several of them

¹⁴<http://www.ilo.org/public/english/dialogue/sector/ap/educat/forums/safrica.htm>

¹⁵<http://www.ilo.org/public/english/dialogue/sector/ap/educat/forums/docs/santiago-decl.pdf>

and a tripartite delegation from the Trinidad and Tobago NSG, analyzed the situation of Caribbean teachers and in particular migration issues highlighted by the Commonwealth Teacher Recruitment Protocol. The forum adopted the *La Romaine Plan of Action for Caribbean Teachers*¹⁶ with recommendations for future action in all Caribbean countries.

Consideration and implementation of policy options

The Office has incomplete information on the extent to which the policy options developed under the programme have been effectively promoted, considered and even more adopted at national level.

Bulgaria's NSG organized a press conference and publication in an official gazette of the Bulgarian version of agreed policy options in the form of recommendations for action that were decided at its national policy forum in December 2005. In its response to the evaluation questionnaire, Bulgaria highlighted the value in itself of having carried out an in-depth analysis of the education system. Moreover, the response noted that the participating teachers' unions used the policy recommendations to help improve equipment and resources for schools. The recommendations influenced negotiation of a collective bargaining agreement and a Strategy for the Development of School Education which was submitted to and approved by Parliament. As a result, funding in secondary education has been improved, including programmes for school repairs, free textbooks for grades 2 – 4, buying of computers, teachers' training and establishment of focalized subject schools.

Mauritius' reply to the questionnaire considered that the assessment produced by the NSG was of great value as it was now considered a major document, a "master plan" for future actions of the Ministry of Education and the education community at large which could be the basis for major education reforms now under consideration in the country. However, education authorities had yet to commit to the proposals.

Nigeria submitted the policy recommendations from the work of the NSG, and the set of recommendations contained in the *Pretoria Declaration on Teachers* to the Federal Ministry of Education (FME). The FME has yet to react to the document and the Pretoria Declaration. The Secretary of the NSG nevertheless expressed his disappointment that the Pretoria Declaration was not submitted officially to the FME through the ILO. The Office had arranged to transmit the Pretoria Declaration's recommendations to a ministerial meeting on education convened by the African Union (AU) in Addis Ababa in January 2006, including Nigeria, but last minute commitments to other priority activities by the ILO's Regional Office prevented the communication and promotion of these policy recommendations.

Trinidad and Tobago sent the results of the agreed draft of its national report and policy options to the Permanent Secretary of the Ministry of Education in April 2005.

¹⁶Forthcoming on the programme Website

The Office has not received information from other participating countries concerning action taken to promote and implement results of the national assessments.

Global report and information sharing

Early in the EDAP development, the Office created and regular updated a programme Website as foreseen in the programme design. In addition to public information and published reports, it gives constituents in participating countries and members of the Global Steering Group access to unpublished documents through a password-protected “participants only” feature. Moreover, resources on programme issues were periodically identified with support from the ILO library and sent to constituents in the programme countries in specially targeted electronic “information feeds”.

The delivery of the global report, expected to be a significant contribution to national and international understanding of the main issues has been delayed beyond its initial publication date in 2006. The reasons are that some countries have not yet completed their work, and temporary changes in the work assignments of the programme staff and the large number of tasks associated with support to the geographically largest and most complex action programme reduced the Office’s capacity to produce the report in 2006. Moreover, work on an international database to underpin the work and provide a more sustainable basis for measuring future trends has had to be redirected to avoid duplication with a recent publication of UNESCO, containing a range of similar indicators.¹⁷ Barring further unforeseen obstacles, it is expected that the report, synthesizing international trends and remaining challenges based on the national reports, the policy dialogue forums, information from the database, and other sources, can be completed by the middle of 2007.

Findings regarding project performance

National steering groups and reports (Phase 1)

Countries responding to the questionnaire “fully agreed” that producing a national assessment helped to understand the issues and challenges involved. The assessments had helped the Government or all three constituent groups to decide on future actions. In Bulgaria, the participating teachers’ unions used the policy recommendations to help improve resources for schools, including funding of secondary education. The recommendations also influenced a collective bargaining agreement and a strategy proposal on school education submitted to Parliament. Mauritius responded that the report was an extremely valuable document for the Government to consider as a “master plan” for developing the teaching profession. Nigeria considered that the report showed

¹⁷*Teachers and Educational Quality: Monitoring Global Needs for 2015*, UNESCO Institution for Statistics, 2006.

the existence of some gaps in teacher preparation and deployment, though it could have been improved if more states of the country had been covered in the survey.

Concerning other countries, the programme staff considers that the process of producing the national assessments provided a valuable forum and a framework for reflecting on the range of issues facing the teaching profession and therefore education. Many of the NSGs met regularly to plan, coordinate and approve the report and thus worked as a forum for generating information and exchanging views on national priorities. Where fully utilized, as in the case of the more complete country reports mentioned above (for instance in Argentina, Bulgaria, Chile, Niger and South Africa), the exercise produced a rich set of information as background for the key policy recommendations. This was all the more valuable where countries produced supplemental reports on related issues from their own resources, such as Chile and South Africa, or measured teacher and/or user satisfaction with existing policies as guides for change, as for example in Mauritius and Niger.

The evaluation of the NSGs also pointed to gaps in coverage or areas for improvement. These included certain subject areas not originally included in the proposed conceptual framework in Bulgaria, inclusion of a wider range of stakeholder viewpoints in Mauritius and greater geographic coverage in Nigeria. Many of these gaps were considered to be due to the relative lack of financial support from the ILO to NSG research and analytical work. Nigeria for instance pointed out that more financial assistance from the ILO could have helped the NSG secretariat in its functions, particularly in producing relevant documents. It could have also helped in the survey (for which the ILO provided no funds), supporting members of the NSG from the participating organizations who carried out the survey work. It should be noted that in this case, the Office indicated from the start that its resources were limited, and it would probably only be able to support the convening of the NSG meetings (which it did) or research work but not necessarily both. For this purpose, strong efforts were made by the Office to interest other education sector partners in support of the NSG's work without success.

Similarly, in another country where the ILO resources were heavily invested in developing appropriate research tools and methodologies for assessing the agreed issues, Senegal, the process has come to a halt reportedly for lack of additional resources to see through the more extensive investigation judged necessary by the NSG.

The social dialogue processes at the heart of the NSG mechanism appears to have been one of the more substantial benefits at least in the short term. No country has reported anything other than positive derivatives from having government planners and decision-makers working together with teacher union representatives, and in the majority of cases representatives of national or school-based employers, on issues of common concern to all those involved in teaching and education. As an example, Bulgaria felt that the social and political dialogue between the Government, its Ministry of Education and Science (MES) and representatives of the NSG had been a prerequisite for an exchange of positions and ideas on the issues, and served as a "guarantee" that the MES would work towards implementation of its commitments. For Nigeria, the information

sharing with other stakeholders such as Nigeria Union of Teachers and Teachers' Registration Council of Nigeria was rewarding and a highly educational experience for all NSG members.

Policy dialogue forums (Phase 2)

Participants at the three regional or sub-regional policy dialogue forums indicated during and as a part of the post-forum evaluations that the forums helped them to understand the working lives of teachers in countries with similar traditions, cultures and conditions, and considered it important to continue encouraging this kind of dialogue. Mauritius specifically noted that interregional dialogue to promote implementation of recommended changes should be encouraged. Similar expressions of support came from participants at the enlarged national forum in Bulgaria, all the more that this meeting took place against the backdrop of a national teachers' strike.

The outcomes of these forums enhanced the exchange of information by providing a concrete focus for regionally (or nationally) specific policy options or recommendations for action to be pursued after the meetings concluded. In the three regions concerned – southern Africa, Latin America and the Caribbean – a sort of “road map” now exists on commonly perceived challenges and possible solutions concerning the EDAP themes, which could be followed in inter-country exchanges, and supported by a range of international organizations directly or indirectly involved in these issues. Potential exists in one region – Africa - to step outside a purely sub-regional context by encouraging information sharing and technical cooperation on major programme challenges such as recognition of qualifications, teacher mobility/migration and social dialogue/labour relations in education between the region's most populous country, Nigeria, and one of its most dynamic regional frameworks, SADC, including South Africa, the region's richest country in terms of GDP.

Very recently, one of the countries participating in a regional policy dialogue, Brazil, which had initially considered but not followed through on commitments to participate in the programme, has contacted the Office to request support in order to complete a national report on the issues under discussion by a tripartite NSG created following the Santiago forum, and to organize a national policy dialogue forum. This is the first indication that any of the countries participating in regional policy dialogue forums have followed up with indications of specific activities to continue the knowledge sharing or implement policy options as far as is known by the Office, but may be considered an encouraging sign for the future.

Consideration and implementation of policy options

The responses to queries concerning immediate impact of the NSG work in the form of promoting and implementing the policy options derived from the joint or tripartite national reflection is not overwhelmingly positive. Despite efforts to promote

use of the NSG's work as noted above, Bulgaria considers that in order to feel the lasting benefits of the EDAP for the sector the programme requires further follow-up, especially after Parliament's approval of the Strategy for the Development of School Education. In Mauritius, the results of the national assessment as a sort of action plan had fulfilled initial expectations, but the Government was reportedly not giving the report the attention it deserved, and not much had been achieved concretely since the report and policy options were made known to decision-makers. Nigeria's NSG believed that the policy options, when implemented by the FME, would be useful in planning and implementing improvements for the teaching profession, and could have "lasting benefits". There is a feeling that the results of the EDAP would be carried forward by the national partners (including members of the NSG), if logistical support is given, in other words financial support from external partners.

Overall, however, two findings of the immediate follow-up are that little is known about the promotional and implementation efforts of most programme countries, and where this is known through the questionnaire responses, many of the options had yet to be fully considered and were far from being implemented. Whereas there is still time for the proposed policies to have an impact before the end of 2007, more intensive action by NSGs and support from the ILO will be required and was in fact requested by Mauritius and in a more general sense by Nigeria.

Global report and information sharing

The development of a dedicated programme Website provided an important potential means of information sharing between country participants and the ILO on programme issues. Despite being a trilingual Website, which implies considerable investment of staff resources, there is little evidence that country participants or international sectoral constituents extensively used the Website. Questions may therefore be posed as to the design and content of such a means of knowledge and information sharing if such efforts are to continue in the future.

The parallel information sharing of electronically generated sources in cooperation with the ILO Library also did not receive much feedback to the effect that such resources contribute substantially to country level work, although this is not to be excluded. In this respect, Mauritius felt that more such information sharing should be directed to individual NSG members.

The delay in producing a global report, and a companion database on key teacher indicators, both foreseen in the programme's Phase 3 precludes an evaluation of the usefulness of these resources. However, it may be presumed that as some sectoral constituents have already enquired about the new timeline for a report on programme themes, such resources are still desired and constitute a priority for ILO action in the immediate future.

Conclusions

National steering groups and reports (Phase 1)

The chief indicator for the social dialogue process was that the NSGs would function during the programme's timeframe. Leaving aside the two countries (Dominica and Mali) that launched NSGs, but did not carry this process forward after the first meeting, eight of ten core countries maintained active social dialogue through the conclusion of either draft or national reports on major challenges facing their countries on the programme theme, including substantial policy recommendations for change, both of which were the principal focus of their activities. Eight of ten also helped to organize or participated actively in regional or national policy dialogue forums to further engage in an exchange of views, information, good practices, etc and thereby contributed to furthering consideration of policies for change through the adopted declarations, consensus statements or plans of action. A further NSG, Niger, is interested to see their work to a conclusion in the form of a sub-regional workshop with Senegal and like-minded countries of French-speaking West Africa.

On average then, social dialogue in the form of the NSGs in EDAP, joint or tripartite, and frequently involving other stakeholders, functioned for at least a period of 12-18 months, or between one-half to three-quarters of the original intended timeframe of the programme. This can be considered a modest step forward given the obstacles and constraints presented elsewhere in this report. The sustainability of the NSGs as broadened forums for social dialogue on education sector issues and the teaching profession more specifically in any of the participating countries remains to be determined.

In terms of a second indicator – that the partners in the participating countries produce national assessments and policy options on the programme theme based on a common conceptual framework, and recommendations on policies and actions to address one or more of the four ILO strategic objectives – nine of ten functioning NSGs achieved this goal. Despite very limited resources from within the country and the ILO, except for two countries which mobilized considerable amounts of human and financial resources internally, the partners represented on the NSGs devoted considerable time and effort to realizing a substantive national analysis of difficulties and potential solutions to the perceived problems. This would rate as a considerable achievement under the circumstances. One conclusion could be that resources of future programmes of this kind should be limited to a smaller number of participating countries so as to give greater support to NSGs, some of whom clearly had capacity limitations to manage the process with the human and financial resources at hand. An example is the conclusion from Mauritius that the NSG should have been more empowered to do more field work and meet all education stakeholders in working sessions and seminars in order to gather a larger spectrum of views and concerns for policy-makers.

Consideration and implementation of policy options

This evaluation cannot conclude that one of the key impact indicators – that some of the policy options are transformed into legislative or administrative measures or provisions of collective bargaining agreements in three to four countries by the end of 2007 – has been met, at least not yet. The available evidence suggests that only one country – Bulgaria – has so far seen substantive policy change through legislative or collective bargaining actions. Two other countries, Mauritius and Nigeria have affirmed the importance of the policy work, but themselves conclude that there has been little in the way of change in terms of policy decisions up to the writing of this report. The extension of the programme timeframe to the end of 2007 provides an opportunity to test whether additional efforts (see Recommendations below) by the national partners and the ILO, as suggested by Bulgaria, can achieve more measurable impact. In that respect, Bulgaria has concluded that a steering committee to look into implementation strategies would be important. The Office considers that this should be in fact the continuing role of the NSG.

Policy dialogue forums (Phase 2)

In an attempt to broaden the knowledge and information sharing activities of EDAP within a framework of social dialogue, the programme design established an objective and indicator to measure success to the effect that some countries not participating as core countries in the programme would nevertheless participate in a sub-regional forum to exchange experiences and benefit from the work of the core countries. As noted above, the evidence suggests that this indicator was largely achieved and served to highlight the fact that more than double the number of core countries benefited from programme work and the opportunity to share experiences and practices that could influence future change. With ten additional member States in Africa, two in Spanish- or Portuguese-speaking countries of Latin America and eleven in the English-speaking Caribbean participating in such forums, the programme built in an experiment in “scaling up” to as many as 33 ILO member countries (counting also the ten core countries), many of them including employers’ or workers’ (teachers’) organizations. This experience could prove to be a useful guidepost for future programmes.

A further indicator of the “knock-on” effect of knowledge sharing stipulated that some of the countries participating in sub-regional forums would follow-up by establishing NSGs or their equivalent to continue working on the programme theme by means of social dialogue. So far, only one such country, Brazil, has built on the experience of the initial regional exchange to create its own NSG for continuing policy work and social dialogue on programme issues. It may be concluded that the attempt to spread knowledge and information sharing beyond a select group of countries met with modest success.

Global report and information sharing

The indicator that the Office would produce a global report on the programme theme within 30 months of the programme's commencement was not met, for reasons that relate to the inability of all countries to complete work as expected, the possibly overly ambitious nature of the programme and to the internal ILO distribution of human resources that rendered adherence to a very strict timetable difficult to achieve. With the decision to extend the programme timeframe through 2007, there are good prospects that the objective and indicator can still be met in ways that benefit national and international constituents.

On the other hand, the indicator specifying that the Office would enhance international information exchange through a programme Website and other forms of information sharing among participating countries was at least partially achieved. At the same time, the conclusion can be drawn that improvements need to be sought in this aspect of a programme to better meet constituent needs.

Recommendations

National steering groups and reports, and policy dialogue forums

As the programme continues through the end of 2007, priorities for ILO action to assist participating countries to continue and where possible deepen the social dialogue process and benefit from the research and policy work include:

- assist Senegal and where necessary Trinidad and Tobago to complete and publish their national reports with policy options;
- help organize a regional exchange of country reports and experiences between Niger, Senegal and neighbouring countries in West Africa, or assist Niger in the convening of a national stakeholders' meeting;
- respond to Brazil's recent request to assist in completing a national assessment and the organization of a national policy dialogue seminar.

Consideration and implementation of policy options

ILO has been requested to assist countries who wish to sustain the social dialogue process and undertake reforms based on the proposed policy options. The Office should no doubt focus its limited resources on those countries, which express the need for assistance in this direction. Examples are Bulgaria which has indicated that the programme would continue after approval of a proposed strategy on school education; Mauritius and Nigeria which have urged ILO support in efforts to implement policy options; South Africa, which has offered to work with the ILO to share its institutional social dialogue experience with other SADC countries and Nigeria; and countries which

have recently or still must complete their assessments such as Niger and Trinidad and Tobago.

The ILO may also wish to consider building on developing cooperation with the Commonwealth Secretariat to foster good practices on teacher recruitment in relation to mobility and teacher migration. Discussions are relatively advanced on the subject of a formal Letter of Agreement to set out objectives and conditions of cooperation between the two organizations.

Global report and information sharing

One of the priorities for action within the next twelve months or less will be for the Office to complete the programme database and global synthesis report, disseminate it and promote the results among core programme countries as well as those participating in the policy dialogue forums.

Programme planning and improvements

A priority for the Office should be to examine internal ILO planning mechanisms and means of supporting sectoral programmes at national level through its area and sub-regional offices, using Decent Work Country or other programming frameworks. The experiences of EDAP, not foreign to virtually all other programmes, have been that the relative isolation of such a programme from the regular cycle of ILO programme and budget planning needs to be addressed to strengthen design (choice of countries, commitments of national actors) and implementation.

Similarly, priorities for constituents, particularly workers' and employers' representatives, should be to examine means of encouraging and supporting sustained social dialogue mechanisms in programme countries, building on the existing NSG structures, and to work out the best means of encouraging national constituents to influence the choice of priorities in local Decent Work or other ILO programming frameworks.

Lessons learned

Programme design

In order to ensure a strong commitment of participating countries, the action programme was designed for countries' self selection. Invitations were addressed to a large number of ILO member States other than those who are also members of the OECD, and the twelve which eventually accepted to meet programme conditions were joined in those countries by teachers' organizations, and as appropriate employers' organizations, in a NSG that constituted a basic social dialogue forum. This process

constituted one of the programme's strengths, since the Government through the Ministry of Education – the major employer of teaching personnel in each country – was committed from the outset, thereby avoiding difficulties experienced in many other action programmes. Ministries of Labour also participated in all countries, often playing a very active part in the programme work on issues of human resource planning and labour relations including social dialogue.

Programme implementation

However, the Office found it increasingly difficult to support so many participating countries financially and technically. With contributions from regional and sub-regional offices, the Sectoral Activities Programme secured additional funds to organize two major sub-regional and one national forum on policy dialogue, and supported the holding of a third regional meeting, but more financial assistance from the ILO would have helped the NSGs in their functioning, as was mentioned by Nigeria and Mauritius. Moreover, despite being strengthened as the programme developed, the ILO programme staff was not sufficient to manage such a large programme, resulting in delays in responding to country requests for technical assistance, especially timely supply of information, and the production of the phase 3 global report. Bulgaria still gave high marks for timely supply of information and technical assistance. Despite the positive gains from wide geographic scope of the programme, a key lesson is that a smaller number of countries should be invited to participate in such a programme given the limitations on ILO programme staff and financial resources, so as to better support the programme countries and constituents. Otherwise, the Office would need to devote more human and financial resources for the equivalent number of countries.

A handicap in securing support to the programme was late programming in many countries. The link with the ILO programme planning cycle was weak and the work plans of ILO sub-regional offices mostly determined already, and therefore difficult to alter in order to accommodate the action programme. Most ILO sub-regional offices nevertheless made significant efforts to provide some support and even nominated a focal point in their staff. Partly as a result, two of the initial core countries never advanced beyond establishing a NSG, information or technical assistance was provided late in some cases, and the Office was not able to support NSGs to meet or produce promised outputs.¹⁸ Action programme planning and implementation therefore needs to be tightly coordinated with the overall Office programme and budget cycles including for Decent Work Country Programmes. The Office's new Strategic Management Module (SMM) may help in this regard. Sectoral constituents, especially employers' and workers' organizations, should in turn be more active in expressing their desire for action programmes to be included in country programming.

¹⁸ As an example, in its response to the questionnaire, the Nigerian NSG noted that ILO offices in programme countries should show more interest in the programme, despite the fact that in Nigeria, the ILO office assigned one of its programme staff as focal point for the education sector action programme, and this official was actively involved in supporting the activity.

Knowledge/information sharing

Information and knowledge sharing activities at national and regional level constituted one of the programme strengths. This is the universal view of participating countries. The regional forums in Africa and Latin America were especially judged positively as a foundation for education reforms in all countries involved. In the Caribbean, the Commonwealth Secretariat was inspired to organize a similar policy dialogue forum in a modified tripartite arrangement involving teachers' and employers' organizations along with selected Ministries of Labour to analyze most of the key issues covered in the ILO programme. This cascading effect of information and knowledge sharing has advanced the ILO's strategic objective on tripartism and social dialogue.

Partnerships and funding

Some resources were obtained beyond the regular budget programme resources from other regular budget budgetary lines and from extra-budgetary sources. ILO regional and sub-regional offices supported the NSGs and made financial and/or organizational contributions to the holding of the national or regional policy dialogue forums. International organizations, including UNESCO, Education International and the Commonwealth Secretariat respectively made financial and technical staff contributions to the Southern African policy dialogue forum or the holding of the Caribbean forum. Other organizations, including OECD, CARICOM, OAS and SADC, shared information and/or made technical contributions. In contrast, attempts to engage financial contributions from major bilateral or multi-bilateral donor organizations were not successful.

Overall however, the focused activities of this action programme appeared to offer a moderately successful formula for ILO work on a specific theme linked to the major international objective of attaining EFA and creating synergies with some international actors in education. One concrete result is that the ILO and Commonwealth Secretariat may conclude a formal Letter of Agreement to cooperate on teacher recruitment and migration issues before the end of 2006. More synergies with traditional partners such as UNESCO and EI¹⁹ remain to be achieved.

Social dialogue: key elements

Perhaps the most important lesson to be learned is that the social dialogue process to drive an action programme requires patience and commitment. This is particularly the case where it engages actors less than or not at all familiar with ILO principles of tripartism and social dialogue compared to traditional constituents, such as government

¹⁹ Notably with UNESCO's Teacher Training Initiative for Sub-Saharan Africa, launched in 2005, which includes several education sector action programme countries, and with EI, which launched a programme on EFA and HIV/AIDS among many of its affiliated members, including several ILO action programme countries in 2005.

authorities other than the Ministry of Labour, and a wider circle of stakeholders like school employers or managers not directly involved with national employers' organizations, teacher training and policy institutions or parent-teacher associations. Adopting the ILO values of tripartism and social dialogue requires considerable learning and commitment from these partners as well as support from the ILO and its constituents to meet multiple political and social challenges within a given country.

Appendix 1

Office questionnaire: Evaluation of ILO Action Programmes 2004-2006 (addressed to chairpersons of NSGs of the education sector action programme)

You are kindly asked to fill in the attached questionnaire and return to the indicated address in the ILO. You may include additional information on separate pages and/or relevant documents to support your responses.

Generic questions

1. Do you perceive the social dialogue **component/processes** of the Action Programme in your country to be functioning effectively? Please explain.

2. Was a meaningful plan of action or similar document adopted for the sector as part of the Action Programme? Yes ____ No ____

How do you assess the document?

If none was prepared, what were the reasons?

3. Has the Action Programme led to **results** that are relevant to the social and economic development of the sector in your country? What were its significant achievements in your view? Were some of your expectations not fulfilled? Please elaborate.

4. Do you think that the Action Programme will produce **lasting benefits** for the sector in your country even after ILO's direct support ends? Do you think the results of the Action Programme will be carried forward by the national partners of the Action Programme (including yourself)? Please explain.

Questions specific to the Education Sector Action Programme: *Teachers for the future: Meeting teacher shortages to achieve Education for All*

1. The national assessment/report on the programme theme based on a conceptual framework provided by the ILO assisted in understanding the issues and challenges faced on this question in your country.

| Fully agree | Agree somewhat | Disagree somewhat | Fully disagree |
|-------------|----------------|-------------------|----------------|
| | | | |

Please explain your perception, and as appropriate, how you think that the report could have been improved.

2. The policy options resulting from the national report were useful in assisting education sector decision-makers in Government, teachers' organizations and private sector employers to plan and implement improvements for the teaching profession.

| Fully agree | Agree somewhat | Disagree somewhat | Fully disagree |
|-------------|----------------|-------------------|----------------|
| | | | |

Please explain in what ways the policy options were useful or not, and your perceptions of how they could have been improved.

3. Please assess the value and impact of the sharing of information and experiences with other education sector stakeholders in one of the forums in which you participated:

- a. the national policy dialogue forum organized in your country;
- b. the sub-regional policy dialogue forum organized in your region.

4. What steps have been taken to transform any of the policy options resulting from the national report and policy dialogue forum into legislation, administrative measures, policy documents or provisions of collective bargaining agreements to address identified challenges concerning the teaching profession? Please indicate current or planned steps.

5. Please assess the timeliness and usefulness of information (Website, electronic information feeds) and technical assistance provided by the ILO in assisting the National Steering Group to carry out its work.

Timeliness: information or technical assistance was provided in a timely manner

| Fully agree | Agree somewhat | Disagree somewhat | Fully disagree |
|-------------|----------------|-------------------|----------------|
| | | | |

Usefulness: information or technical assistance provided was helpful in assessing and helping to meet the challenges in your country

| Fully agree | Agree somewhat | Disagree somewhat | Fully disagree |
|-------------|----------------|-------------------|----------------|
| | | | |

Please explain how the information or assistance from the ILO could have been improved.

6. Please provide any additional information that you think would help the ILO to evaluate the design and implementation of this programme if repeated in other countries.

Appendix 2

Teachers for the future: Meeting teacher shortages to achieve Education for All

Draft conceptual framework for national country reports or policy briefs

Concept of the framework

Recent international surveys (ILO and UNESCO, 2002)²⁰, show that despite substantial progress in recruiting new teachers since 1990, demographic pressures, the need to reduce the high out of school population and relative unattractiveness of teaching are making a chronic situation worse in many countries. Education for All (EFA) goals by 2015 are threatened by current or prospective teacher shortages, hence the need to better understand and develop policies and concrete measures to address these shortages in the interests of universal access and provision of quality basic education.

The conceptual framework proposed below is meant to guide data collection and analysis in countries with widely differing education structures, resource levels, challenges facing systems at national and/or local level and capacities to deal with them through agreed actions by ILO constituents - government education authorities, private school employers/management, teachers' organizations - and other education stakeholders. Teacher shortages will not have the same profile everywhere. They may result from overall lack of teachers, a low percentage of qualified teachers according to government standards, an uneven distribution by geographic area (sufficient or excess numbers in urban or richer areas, shortages in rural or disadvantaged areas), lack of teachers at a particular level (primary or secondary) or subject area (sciences, maths, ICT, technical/vocational, etc), or a combination. The proposed framework is therefore modulable, to take account of differences between and within participating countries, and the most important priorities to be defined by national steering groups. Participating countries may find it necessary to add to, or focus exclusively on certain questions, so as to concentrate on the greatest priorities.

However, to the extent that each participating country can address most or all of the main chapters as proposed, the regional and international comparability of the action programme's outputs will be enhanced. This would in turn help to maximize programme benefits for participating countries by allowing them to share the results of national analysis and good practices – policies, legislation, incentive programmes, social dialogue mechanisms, etc. - in a meaningful way through regional policy dialogue forums, a proposed international database and the global monitoring report to be produced at the end of the programme.

²⁰ Siniscalco, Maria Teresa, *A Statistical Profile of the Teaching Profession*, ILO and UNESCO, Geneva, 2002

It is not expected that original research or evidence gathering will need to be conducted on all questions suggested in the outline below; where relevant, existing or ongoing research or policy analysis may be adapted to one or more sections. Some data will be readily available from ministerial databases or previously published reports, which should be exploited to the fullest so as to avoid duplication.

Suggested outline for Country reports/Policy briefs

Executive summary (suggest maximum 3 single-spaced pages with main highlights)

A brief Executive Summary should focus on the most important challenges identified in the research and analysis phase, success and failures in dealing with the problems and proposed solutions.

I. Context of the national education system (5-10 single-spaced pages)

- *Overall structure:* Brief description of school-going age, levels of education, national education objectives and recent reforms (for example curricula) which would influence decisions on teacher recruitment, training and employment
- *Student competences:* new student competencies required in the future and their impact on teacher education and continual professional development, for instance, development of teamwork, critical thinking and self-learning capacities;²¹
- *Demographics:* numbers of students by level of education and geographic area (districts, regions, or urban/rural), projections to 2015 if known and implications for teaching
- *Financing:* National resources to education, as a percentage of GNP or GDP, percentage of government expenditures by level of education and private contributions where known; obstacles to a sound financial basis for education and sound distribution of resources to teaching and teaching support functions
- *Governance/administration:* Decision points concerning teacher recruitment, training and employment - central, federal, regional/district or local level
- *Teacher education and training requirements:* Initial qualification levels and requirements for upgrading/maintaining certification if any
- *Public support/constituent considerations:* Degree of public satisfaction or dissatisfaction with the education system and teachers; government, employer and teacher organization desires, satisfaction and frustrations with education and teaching

²¹ Additional point added at the request of the National Steering Group, Trinidad and Tobago

II. Composition of the teaching profession (actual and trends in the last 5-10 years where known or possible to obtain, 5-10 pages with more details in annexes if necessary)

- *Numbers of teachers* by level of education – pre-primary, primary, secondary – and public/private
- *Gender distribution* of teachers by level of education and position of responsibility (school directors, deputies, heads of department in larger schools, curricula or other specialists)
- *Age distribution* of teachers by level of education
- *Geographic distribution* of teachers – by region/district or by urban/rural areas as appropriate
- *Auxiliary “teaching” staff*: numbers/percentages of para-professionals, teaching assistants or other categories of less than fully qualified teachers engaged in full/part-time teaching
- *Substitute teaching staff*: planning and initial operation of the substitute teachers scheme in Trinidad and Tobago (point applicable only in Trinidad and Tobago)²²
- *Teacher qualifications*: numbers/percentage of teachers at the official qualification/certification levels (and by gender, age and geographic distribution where possible)
- *Professional development*: estimates of numbers/percentages of teachers having access to and undergoing some form of continual or in-service training, and length of training where known
- *Retention and distribution*: a) numbers of teachers leaving service and reasons (personal decision, retirement, deaths); b) returning teachers; c) analysis of reasons (possible sample surveys)
- *National/regional/international mobility*²³: a) numbers of teachers leaving for employment in other countries in the region and internationally (Europe, North America, etc), among states or regions of federal systems²⁴ and major destinations; b) numbers of non-nationals recruited to teaching by sending country, regionally and internationally.

²² Added to replace the point on “auxiliary teaching staff” at the request of the National Steering Group, Trinidad and Tobago (applicable in Trinidad and Tobago); “auxiliary teaching staff” also will not apply to Dominica which does not have such a category

²³ Additional point added at the request of the National Steering Group, South Africa.

²⁴ At the request of the National Steering Group, Nigeria, “national” mobility will also be considered in the context of this large federal State

III: *Teacher candidates, recruitment, education and professional development (10-15 pages)*

- *Teacher candidates:* a) perceived difficulties in attracting individuals to teacher training programmes and b) evaluation where possible of the qualifications and motivation of those who choose to enter teacher education
- *Initial teacher education:* identified weaknesses in initial teacher training programmes structures, length, quality and relevance affecting: a) numbers of qualified teachers graduated; b) deficiencies in the skills and competencies of graduating teachers; c) recent reforms which have led to successes in overcoming these weaknesses
- *Professional development:* a) obstacles for serving teachers to in-service, continual professional development courses and implications for teacher skill levels/competencies and motivation; b) alternative provision (teacher resource centres, school-based training, cluster arrangements, distance learning systems,²⁵ etc); c) recent innovations to improve access and quality
- *Professional assessment:* a) means of teacher evaluation; frequency and quality of evaluation by inspectors or other evaluators; b) impact on teacher skills, careers and motivation

IV. *Employment, careers, teaching and learning conditions (10-15 pages)*

- *Recruitment/induction:* a) placement criteria and mechanisms for first assignments, especially disadvantaged or ethnic minority areas; b) induction procedures for new and returning teachers; c) mentoring by school directors or experienced teachers; impact of weaknesses and reforms on recruitment and job satisfaction in rural and disadvantaged areas
- *Careers:* transfer and promotion criteria and application, with special attention to placement and mobility between a) urban and rural or disadvantaged areas, b) for women and married teachers and c) for HIV positive teachers; d) between primary and secondary school levels²⁶
- *Remuneration/material incentives:* a) salary rates for beginning, mid-career (10-15 years service) and end of career teachers (25-30 years service); b) comparisons with at least two national comparator professions, one public and one private; c) additional material incentives/bonuses for responsibilities, housing, transport, medical care/social security with special attention to rural and disadvantaged areas; e) material incentives for shortage subjects; f) performance pay schemes and impact on recruitment and job satisfaction; g) percentage of teachers engaged

²⁵ Additional point added at the request of the National Steering Group, Nigeria

²⁶ Additional point added at the request of the National Steering Group, Dominica

- in other, non-teaching jobs or private tutoring; h) as appropriate according to regional mobility patterns, comparison with two comparator professions, one public and one private in a neighbouring country likely to attract serving teachers²⁷
- *Teaching and learning conditions:* a) statutory hours of contact and/or overall teaching (including curricula preparation, student evaluation, counselling, supervision and school or community-based extra-curricular time), b) estimates of actual hours of total teaching time per month or year where available and indications of impact on teacher satisfaction; c) indications of teacher absenteeism and reasons; d) pupil/teacher ratios by districts or urban/rural areas, and actual average class sizes where known; e) indications of deficiencies in teaching materials; f) evidence of school insecurity and violence as influences on teacher motivation and retention
 - *Leave provisions:* a) provisions for medical, family responsibility and annual (holiday) leave and impact on teacher retention in rural and disadvantaged areas; b) provision for study (sabbatical) leave and impact on teacher competencies/skills and motivation; c) cover provision for teachers on leave and costs to education authorities
 - *Targeted incentive programmes:* describe and analyse any special incentive programmes designed to address identified shortages, quantitative or qualitative, and their impact
 - *Regional/international recruitment programmes:* a) recruitment plans/programmes for non-nationals from other countries in the region or internationally and impact (assessment of shortages being met overall, by subject or area); b) impact of plans/programmes to reintegrate teachers returning after a period of work in another country.²⁸

V. *Social dialogue and participatory decision-making in education* (10-15 pages)

- *Information sharing:* a) means and subjects of information sharing on educational policies and planning between education authorities and private school employers/management and teachers' organizations; b) structures incorporating teachers' views in EFA and other major education reforms
- *Consultation:* a) mechanisms and subjects of consultation between education authorities and private school employers/management and between public or private education employers and representatives of teachers on teacher education and professional development, professional conduct and ethics, teaching and learning conditions not subject to collective bargaining; b) evidence of successful reforms arising from consultations

²⁷ Additional point added at the request of the National Steering Group, Lesotho

²⁸ Additional point added at the request of the National Steering Group, South Africa

- *Negotiations/collective bargaining*: a) mechanisms and subjects of bargaining between public and private educational employers and teachers' organizations, i.e., career structure, remuneration and incentives, teaching and learning conditions and evidence of impact if any on teacher recruitment and retention; b) impact of strikes, conflicts and individual or collective dispute resolution mechanisms on recruitment and retention, if any

VI. *Policy Recommendations* (5-10 pages, bullet point style if possible; focus on implications for policies and practices to resolve teacher shortages, quantitative or qualitative)

- Education policy and planning, with attention to teacher involvement at school level and at district/regional level through elected representatives
- Teacher education and professional development
- Recruitment and retention (career) incentives/disincentives
- Teacher remuneration and material incentives
- Teaching and learning conditions
- Social dialogue between employers and unions on teacher shortage issues