

## COMPARATIVE EDUCATION AND INTERNATIONAL COOPERATION

### PROBLEMS OF EVALUATION FOR INTERNATIONAL CURRICULUM DEVELOPMENT

#### CASE STUDY: TOWARD COOPERATION AND SELF-RELIANCE, SOCIAL STUDIES FOR BASIC EDUCATION IN PERU, COLOMBIA AND VENEZUELA

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*International cooperation in this analysis is the common attempt of educators in Peru, Colombia, and Venezuela to develop a new social studies curriculum for grades I - VI/VII, with participation of professors from The University of Western Ontario and McGill in Canada. Social studies was traditionally taught as separate subjects: history, civic education and geography. In the new program geography is broadened to become environmental studies. The global context is introduced, but the focus of the units remains the child and ordinary persons of the nations concerned with active roles and responsibilities rather than the passive lives as a big boss world unfolds.*

*The case study details the problems, opportunities, methods used, resources available, roles, and results to date. Throughout, the discussion is set in theoretical models advocated by Joseph Lauwerys.*

This study identifies the means of evaluation used (and in some cases considered but not actually used) at the end of the first three years of a curriculum development project, to determine whether it should be supported for a further interval by the Canadian sponsoring institutions: The Canadian International Development Agency, The University of Western Ontario, and McGill. Very similar criteria were used in Latin America by the sponsoring institutions: CODECAL in Bogota, La Pontificia Universidad Católica del Peru, La Universidad Pedagógica Nacional (of Colombia), the Ministries of Education in Peru, Colombia and Venezuela, and a number of school authorities. A number of other agencies (including UNESCO and the regional pacts of Andres Bello and Cartagena) were similarly interested in the evaluation, because they saw the project as a model with potential for other purposes, including its expansion without significant change to other nations.

The evaluation of all educational projects is, or should be, a nearly constant process. Evaluation is a much broader process than examination of students work at stipulated intervals, for it addresses the selection of objectives, the methods used, the capability of the teachers, the adequacy of

data sources, the time involved and other resources required, and even the alternative educational purposes that could be served (1). If the required process is not working, either radical changes or termination seem to be in order. More often, although the process is imperfect, minor (formative) adjustments may be sufficient. Evaluation takes place in many different ways by those involved with different aspects of the process.

**Political Evaluations.** Those responsible for the broad direction of society want education to further their vision of social, political and even international relationships, and laws are often passed to provide the necessary guidelines. Transgression of these politically identified goals, or even failure to promote them effectively, may be sufficient reason to judge any educational project a failure. Because «Toward Cooperation and Self-Reliance» was an international curriculum development project, this first test was given a great deal of attention.

Latin America has not been identified as a traditional recipient of Canadian international development assistance because the need is much greater in Africa or southern Asia (2), but Colombia, Peru and Venezuela were selected by the principal investigators as targets for this project on the basis of prospects of success. The Canadian authorities had no political objections because none of these nations had a government which defied international standards of decency and was therefore unable to participate in any program funded by Canada. The comparative wealth of Venezuela did pose a policy difficulty, for Canadian priorities were to direct financial assistance to nations that were most in need.

Political considerations within Latin America were more easily satisfied, for Peru, Colombia and Venezuela were all members of the *Convenio Andres Bello*, a treaty for cultural cooperation that included among its many objectives the development of common school objectives and programs. By taking into account the existing curricula and general political guidelines of all three nations from the earliest stages of the process, «Toward Cooperation and Self-Reliance» was able to avoid obvious transgressions of this type. Despite changes of government in Peru and Colombia which took place during the first three years of the project, there seemed to be no particular problem. Authorities from the new governments evinced interest and support comparable with that of their outgoing counterparts.

It would be wrong to assume that political evaluations were absent at

(1) ARIEH LEWY. «The Scope of Education Evaluation. An Introduction», in Arie Lewy and David Nevo (editors) *Evaluation Roles in Education*. London: Gordon and Breach, 1981, pp. 1-8.

(2) The average levels of income, nutrition, life expectancy, education and similar indicators of prosperity place most of Africa and Asia well behind Latin America, and behind even the poorest of the nations of this project. CANADIAN INTERNATIONAL DEVELOPMENT AGENCY. *1984-1985 Annual Report*. Ottawa: Minister of Supply and Services, 1985.

the personal level. All members of the development teams had personal views, and they were able to attract into the project several other persons who shared them. In Latin America, one of the most widely endorsed political perspective is that of education (or theology) of liberation, in which improving the oppressed condition of the poor is considered to be a priority in policy choices (3). The justification for this is identified primarily with the teachings of Christ rather than with marxism despite the similarity of this primary objective. Although Marxism is also a widely endorsed political position within Latin America, so are conventional liberalism and orthodox or conservative catholicism (which rejects both the theology of liberation and marxism). All four of these ideas were included in debate, aspects of each of them are reflected in certain units, and teachers or educational authorities will be able to find some elements with which they agree and others that they will surely reject. Although the project is most consistent with the theology of liberation, there was an attempt to avoid statements that would be offensive to those holding other biases. The importance of providing some diversity within the curriculum, of promoting harmony rather than imposing identity, was recognized from the beginning.

**Institutional Approval.** Since almost all of the persons involved in this project are employed by educational authorities (either public or Roman Catholic) their activities are subject to the general supervision of their superiors: deans, directors and sometimes presidents. These authorities must decide whether the activity is an appropriate use of time by employees, if extra funds or support services will be allocated to the project, and if the name of the institution will be conspicuously associated with the enterprise. Initially such decisions are made on the basis of the reputations of the persons to be associated with the project and on the apparent feasibility of the project. Later decisions are made on more evidence about the procedures and even the products of the project. Figure 1 indicates the institutions where such decisions were made, the degree of support or commitment provided, and the stage of the project when the institution made its initial decision. There was a significant risk for those institutions that made early decisions to support the project with substantial resources. None of them has money to waste: all of them face many legitimate requests for more resources than are available. The decision to

(3) Puebla Conclusions. *Evangelization at Present and in the Future of Latin America*. New York: St. Paul Publications, 1980. See also MARTIN CARNOY. *Education and Cultural Imperialism*. New York: David McKay Company 1974; PAULO FREIRE, *Pedagogy of the Oppressed*, New York: The Continuum Publishing Corporation, 1968; PAULO FREIRE. *Education for Critical Consciousness*. London: Steed and Ward, 1973; and Medellin Conclusions: Volume II: *The Church in the Present Day Transformation of Latin America*. Bogota: General Secretariate of CELAM. 1970.

(4) JUNTA DEL ACUERDO DE CARTAGENA. *Sistema Andino de Integración*, 1969 - 1984. Lima: Departamento de Comunicaciones e Información, 1985.

give this project priority over others of local interest was made almost entirely on (1) the basis of an assessment of the potential importance to national and international education, and (2) confidence that the team of persons identified by that time was competent. The early commitments of the University of Western Ontario and La Pontificia Universidad Católica del Peru were of critical importance, for these authorities had special knowledge of the persons initially involved and their decisions were then accepted by other institutions with no similar reasons for confidence.

*Figure 1 - INSTITUTIONAL ENDORSEMENT OF PLANNED CURRICULUM REFORM*

CODECAL	2 years before funding	Funding of proposal development
University of Western Ontario	1 year before funding	Development and funding of proposal, offer of major contribution to contract, if funded
Canadian International Development Agency	major funding granted	University of Western Ontario named as contractor
McGill	first year	Allocation of staff and support services
Pontificia Universidad Católica del Peru	first year	Allocation of staff and resources Inclusion of project in university program
Madre Admirable School in Lima	second year	Significant involvement of staff, students and parents
La Universidad Pedagógica Nacional de Colombia	second year	Allocation of staff and resources, inclusion of project in schools supervised
Various schools Colombia, Peru and Venezuela		Allocation of staff and resources, inclusion of project in curriculum and professional development schedule

**Procedural Competence.** Very few projects are undertaken without being able to draw upon earlier experience — including the problems that have been encountered by others. This project was straightforward curriculum development, undertaken in three nations with many common elements in their educational, cultural, and political situations. Among other things, they were all members of the cultural cooperation pact of Andres Bello. Because the Canadian consultants encouraged the Latin Americans to make all the crucial decisions as an important step toward self-reliance, they did not complicate matters. Procedural competence was gauged by the way in which the team reviewed previous curriculum development projects, the shortcomings of the existing curricula (5), the recommendations of experts from various other nations in similar situations (including the numerous suggestions from UNESCO (6)) and the practical advice from teachers in daily contact with the community and the children. Some members of the project were young and hoped that a successful project would help their professional career. Others, who were well respected members of previous curriculum development projects, helped to satisfy authorities that the team knew precisely what to do. Although fine-tuned from time to time, the initial procedures remained essentially constant throughout the project. This stability and use of well established methods helped to win and maintain the confidence of the administrators and influential scholars in sponsoring institutions during the long gestation period of the new curricula.

There was an important protection for those authorities who could make the final decisions about whether the curricula developments would ever be used, and if so where: they did not have to commit themselves in advance to use the curriculum. Instead, they could permit it to be developed by a project which had no official commission, they could then evaluate the outcome in various ways before making their crucial decision about potential implementation. If they had been required to make an earlier commitment to implement the product, it is fairly certain that the authorities would have been more conservative, more stringent in their assessments, more prone to political control (as opposed to professional involvement) in the project. Since the process of curriculum development and the related teacher capacitation would necessarily extend over several years, it was quite likely that there would be changes in the governments, in the Ministers involved, and within the senior persons of the Ministry. Had a commitment been made by the authorities responsible at an early stage of this process, it is possible that it would not have been honored by their successors.

(5) RODOLFO DE ROUX. *La Integración y la Cooperación en Los Países Latino-americanos: Análisis del currículo y Recomendaciones de unidades para la acción educativa en los Países del Convenio Andres Bello*, Bogota, Colombia: CODECAL, 1983.

(6) See for example Arief Lewy (editor), *Handbook of Curriculum Evaluation*, Paris: UNESCO, 1977.

**External Assessments.** The external assessments of greatest interest are those reflected in the voluntary, helpful behavior of persons (or institutions) with special knowledge of the project. Internal assessments are the technical appraisals of its materials or methods, and are very often conducted by members of the project.

External appraisals are constantly coming to light. One of the most impressive came at the very beginning of the project and has been continually reaffirmed. Because the original contract from the Canadian International Development Agency did not provide resources sufficient for three nations, and because the official guidelines required that a preference be given to the poorer Peru and Colombia, the Venezuelan team began their participation as observers. However, they rapidly made it clear that they would prefer to participate in every possible way — even without financial support. They were even better than this initial promise, for they have contributed as equal partners during a period when declining oil revenues have made conditions in Venezuela very tough. Although their methods of work have been modified to reduce the costs of personnel, materials, communication, and travel, the quality of their curricular materials has consistently been very impressive.

In all of the nations involved, certain project team members have made substantial personal sacrifices to ensure that project work was well done: they have refused other jobs, worked massive amounts of overtime, spent their own money for essential things like transportation, typing, photocopying... all despite the privations imposed in a period when professional salaries in Latin America have been seriously eroded by heavy inflation.

Although the project was able to find ways of repaying these personal contributions, the fact that they were made voluntarily and immediately provides a dramatic assessment of its worth. A third important indication of confidence is that the institutions and persons involved have remained fairly constant, significantly more constant than would be expected in the comparatively volatile situation of education in Latin America. Some teachers have refused available promotions and convenient transfers because they wished to remain with the project; others whose institutional contact with the project was somehow broken have managed to restore the contact at a personal level.

University students and professors are excited about the prospects that the project holds for teacher education. They are aware that in Peru there have been significant numbers of students involved in writing, classroom testing, revising, and polishing the units. There are now prospects of similar program adjustments at La Universidad Pedagógica Nacional in Colombia.

International authorities who have examined the materials and discussed the work with teachers involved have given several positive appraisals. The UNESCO Regional Office in Quito plans to publish several



of the materials as models for curricular and professional development. The secretariate for the Convenio de Cartagena had indicated that all the members of the pact should be involved as soon as possible. Individual scholars from Ecuador have participated in a personal capacity to indicate that they are interested and would like their nation to be involved as much as possible.

**Internal Assessments.** As the materials and methods of the project are examined for their technical quality, attention is usually given to certain priorities:

- (1) the scholarly validity of school materials (as appraised by experts of the discipline rather than by persons with political interests, and by test and examination results);

- (2) the apparent effectiveness of the materials and methods for teaching in the intended way; and

- (3) the efficiency of the process used in development.

**Scholarly Validity.** This curriculum project employed an interdisciplinary approach to the teaching of history, civic education, and environmental studies. Since three nations were to use the materials developed, theoretically the content would be scrutinized from nine perspectives, by experts from the three background disciplines for each of the three nations. Provisions for these types of feedback were planned from the beginning. International reviews of all of the materials are intended to ensure not only that nothing inappropriate remains in the finished units, but also that every page deals with the ideas in the best possible way. This kind of international and interdisciplinary double checking reflects the recommendations of the International Schoolbook Institute in Brunswick (7). Such assessment procedures were initiated but not yet pursued with the desired rigour because there were neither sufficient resources nor time available in the first contract of «Toward Cooperation and Self-Reliance».

A second means used throughout Latin America to determine the level of scholarly mastery of the children is the use of tests and examinations. These normally take two forms: periodic testing of the pupils by their teachers or by the principals, and formal examinations at the end of each stage of schooling by the national or local authorities. This regular employment of tests or examinations is intended to protect society (including the pupils) against the possibility of ineffectual teaching or learning, and a limited assurance that bright and energetic pupils would have access to education and the social opportunities that are its possible consequence — even if they were poor. In the case of classroom testing, the test results may also be used to decide how and what to teach the class or a particular pupil.

(7) GEORG ECKERT, «International Textbook Revision», in GEORGE Z.F. BEREDAY and JOSEPH A. LAUWERYS (editors). *The Yearbook of Education: Education and International Life*. London: Evans Brothers, 1964.

By contrast, examinations would almost never be used in this formative manner: they would determine instead if the student would be allowed to continue in school — they would be summative. The transition from traditional, discipline centered instruction to the interdisciplinary work proposed in this curricula will likely be difficult for many teachers and educational authorities, who will almost certainly make invidious comparisons. Consequently, it will be necessary for the new curriculum to help students do well on the traditional types of examinations.

In fact, a strong case can be made for the project including an examination-based comparison of student achievement in the new and the traditional curricula, either at the time of field-studies or in the first few years following wider implementation. It would also be useful to develop more diversified kinds of evaluation procedures (including sample questions) that might be employed by teachers and school authorities in testing or examination programmes. The desired new procedures would aim at evaluation of skills and attitudes as well as knowledge. This is particularly vital because the objectives of the project emphasize values that might be reflected in civic observances, social cohesiveness, sensitivity to environmental preservation, and similar behaviour that can be observed. At least in principle, these can also be measured and compared with the behaviour likely to result when students are taught from a more conventional curriculum (8).

A complication is that interdisciplinary studies cannot readily be compared with single subjects because the content base has been shifted. It will be necessary for teachers and authorities to be satisfied that what is taught is both valid and well learned, and the evidence will have to be presented convincingly. Because testing programmes are so important for Latin American educators, there is a strong case for including this type of research in the near future.

**Professional effectiveness.** Effectiveness for teaching can be predicated theoretically, but invariably it will be assessed practically — by the teachers who ultimately implement it. This project has the protection that very experienced and able Latin American curriculum workers were responsible for the initial development of school materials, and they were working closely with schools where their ideas could be given informal trials at an early stage. Further pilot-testing which both diversified within each nation and international in scope will ensure that the units have been assessed for effectiveness far more effectively than is typically the case (9). In fact, these tests are almost dauntingly demanding. It would not be surprising for units which meet most but not all tests to be finally implemented

(8) ARIEH LEWY (editor). *Handbook of Curriculum Evaluation*. Paris: UNESCO, 1977, p. 48.

(9) See BATHORY ZOLTAN. «The Field Trial Stage of Curriculum Evaluation», in ARIEH LEWY (editor). *Handbook of Curriculum Evaluation*. Paris, UNESCO. 1977, pp. 104-116.



after modifications but without a repetition of the full testing procedure.

One way to develop school units that will be accepted and used properly by teachers is to involve them in their original design and development. Although this procedure was designed into the project and carried out to the degree possible with the available resources, the teachers who participated in the initial design and development of units would have a good chance of using materials successfully whatever their faults. Consequently, pilot-testing all units in a wide variety of schools, including many where problems would be more likely to be identified, was regarded as necessary before national implementation could be considered (10). This kind of pilot testing and the consequent revision of materials to incorporate the feedback has begun but will take time and resources beyond those available during the initial contract for the project.

A comparison with the costs of developing curriculum in Canada suggests that a great deal was done in three years for a comparatively small investment by the Canadian International Development Agency. On paper, much of this saving came at the expense of the Canadian consultants who were paid nothing for their consultation. Although different rates of pay in Latin America make the savings per person less dramatic, the project would have come to nothing but for an even greater sacrifice by the Peruvian, Venezuelan and certain Colombian scholars, who similarly donated their expertise. In some cases the donation was courtesy of their institution (for their job description was altered to make time for the project) and sometimes an honorarium was later paid. In a few cases the contribution was personal and no honorarium was accepted. It is not proposed that such donations be the means of achieving efficiency in the future.

### Conclusion

Evaluation was an integral part of management of «Toward Cooperation and Self-Reliance» during the first contract, then for deciding whether the project should be extended, and if so what changes might be made. This sequence of purposes were constrained during the first contract because the very substantial contributions from Latin American institutions and individuals added to the logic that they should control projects affecting only Latin American education. Naturally enough, their own evaluations and consequent choices were dominant, and differences never threatened the project.

Despite practical and theoretical limitations, it was possible to add financial, institutional, and personnel resources throughout the project while minimizing the loss of support to a few individuals. Under the circumstances, this was success.

(10) Lewy makes an important distinction between *tryout* and *field-trial* in the development and revision of new curricula. He considers the size and diversity of field-trials to be the chief means of uncovering problems likely to arise when implementation is general. *Ibid.* pp. 104-105.