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# ASIA-PACIFIC REGIONAL GUIDE TO EQUIVALENCY PROGRAMMES



**ASIA-PACIFIC REGIONAL GUIDE TO  
EQUIVALENCY PROGRAMMES**

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### ABOUT THE REGIONAL GUIDE

Ten key areas are addressed in this guide in module format:

- Module One: Equivalency Programme Concepts
- Module Two: Policy and Frameworks
- Module Three: Curriculum and Learning Materials
- Module Four: Capacity Building
- Module Five: Facilitators: Qualification Standards and Capacity Building Needs
- Module Six: Delivery Mechanisms
- Module Seven: Learning Assessment and Evaluation
- Module Eight: Resource Mobilisation and Financial Management
- Module Nine: Community Participation, Networking and Partnership Building
- Module Ten: EP Monitoring and Evaluation

The guide has been developed as a generic manual for use by education policy makers and institutions responsible for capacity building of education personnel and practitioners. Practical examples and case studies are provided.

## PREFACE

This Regional Guide to Equivalency Programmes (EPs) for Promoting Lifelong Learning has been developed as a practical guide for education policy makers, planners, managers and practitioners at national and sub-national levels.

The guide is part of a project on EPs within the framework of the Asia-Pacific Programme of Education for All (APPEAL) initiated in 2003. UNESCO supported India, Indonesia, the Philippines and Thailand - countries which have considerable experiences designing and implementing EPs - to undertake research identifying their experiences. That research was shared with six new participating countries - Bangladesh, Cambodia, People's Republic of China, Lao PDR, Myanmar and Mongolia - during a regional workshop in Manila, the Philippines, in 2005, and a publication was then produced titled *Equivalency Programmes (EPs) for Promoting Lifelong Learning*.<sup>1</sup>

Subsequently there was interest from many countries to expand on that publication with a practical regional guide that included examples of good practices. A draft was circulated at a meeting held in Bangkok on June 15 to 19, 2009, and a group of regional experts then consolidated the main outputs into this publication through a series of workshops coordinated by UNESCO Bangkok.

UNESCO Bangkok wishes to express its gratitude to all those who contributed to developing this publication.

I hope that the guide will assist in the development of EPs in countries where as yet there are none, and in the strengthening of existing programmes. Queries, comments and suggestions are welcome.



Gwang-jo Kim  
Director  
UNESCO Bangkok

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<sup>1</sup> UNESCO Bangkok (2006), *Equivalency Programmes (EPs) for Promoting Lifelong Learning*. UNESCO Bangkok. Bangkok, Thailand.

MODULE

# ONE

**EQUIVALENCY**

**PROGRAMME CONCEPTS**



Education plays a vital role in human resource development and social development, especially in the era of knowledge-based societies. The vital role of education means that it is often considered a human right, as stated below:

*All children, young people and adults have the human right to benefit from an education that will meet their basic learning needs in the best and fullest sense of the term, an education that includes learning to know, to do, to live together and to be.*

*World Education Forum, Dakar, 2000*

However, major educational disparities still exist throughout the world. Data from the Education for All (EFA) Global Monitoring Report 2011<sup>2</sup> indicates that:

- an estimated 796 million adults or 17 per cent of the world's adult population lack basic literacy skills. Two-thirds are women,
- in 2008, some 65 million children, 55 per cent of them girls, were not in school,
- in 2008, of 185 countries with data, 116 countries had achieved gender parity in primary education and 62 out of 168 in secondary education. Had the gender parity been achieved, 3.6 million more girls would have received primary education.
- there are large regional, national and in-country disparities in quality of education. Millions of children do not meet expected literacy and numeracy skills after completion of primary schools.

The report indicates that there are about 26 million children who do not attend school in the Asia and the Pacific region, of which about 18 million, including minority children, are in South and West Asia and just under eight million are in the East and the Pacific region. Despite the improved access to secondary education, 45 million adolescents are not in schools in Asia and the Pacific alone. Adult illiteracy is also a major concern. South and West Asia are home to half of the world's illiterate adults, including minorities.

<sup>2</sup> UNESCO. 2011. *EFA Global Monitoring Report 2011, The hidden crisis: Armed conflict and education*. UNESCO. Paris, France.

Strategies to allow greater educational access and to support retention in education are obviously vital for the achievement of Education for All (EFA) goals. To ensure the inclusion of all groups in education, alternative educational channels are needed in addition to the formal school system.

*To meet the goal of Education for All (EFA), it is necessary to provide education not only through formal education programmes, but also through non-formal education programmes to children, youth and adults who have not completed their basic education. Schools can cater education to only children and youth while non-formal education (NFE) is a way to compensate for the lack of full formal schooling by giving opportunities to those who cannot continue their formal education.*

*Equivalency Programmes (EPs) for Promoting Lifelong Learning  
UNESCO Bangkok, 2006*

Today it is globally recognised that learning does not begin and end with a child's entry into and graduation from the formal schooling system. Rather, learning begins at birth or even at the pre-natal stage and continues throughout an individual's life, through formal, non-formal and informal methods.

Recognising this, a number of countries in Asia and the Pacific have established Non-Formal Education (NFE) systems that are linked to formal education through the use of Equivalency Programmes (EPs). Learners are often given the flexibility to move between formal and non-formal channels of education at primary level, secondary level, and beyond. The benefits of EPs are outlined below.<sup>3</sup>

<sup>3</sup> As cited in the foreword of UNESCO Bangkok. 2006. *Equivalency Programmes (EPs) for Promoting Lifelong Learning*. UNESCO Bangkok. Bangkok, Thailand.

*EPs can develop systematic linkages between various NFE programmes and the existing formal basic and vocational education systems. These programmes can play an important role in expanding the learning time and space of learners by providing them with appropriate recognition and certification of their achievement as incentives for them to continue learning throughout their lives.*

NFE and EPs are an important means to help countries to deal with their unique educational contexts and challenges. Some countries may have limited resources in terms of budget, materials and teachers/facilitators for formal education. Social and economic constraints may influence the rate of school drop-out. Countries such as Bangladesh, People's Republic of China, India, Indonesia and Pakistan have huge populations to serve.

NFE serves the needs of those who have missed opportunities in the formal education system. EPs are designed to ensure that NFE offers education of a similar quality and standard as formal education, and with equivalent certification. Achieving these goals requires focused attention on education policy, educational standards, quality assurance, delivery mechanisms, capacity building and development, and monitoring and evaluation.

## Principles

Though each country has its own rationale and requirements in relation to EPs, policy makers may find the following common principles useful:

1. **Equity and access** – EPs must provide equity and access to all target groups.
2. **Relevance and responsiveness** – EPs must be relevant and responsive to national goals and policies, and local and individual needs.
3. **Inclusion and participation** – EPs must be based on appropriate teaching and learning strategies, and must promote a participatory approach.
4. **Culture and gender sensitivity** – EPs need to be sensitive to culture and gender.

5. **Good citizenship** – Similar to all other educational programmes, EPs must promote national values and good citizenship.
6. **Comparability** – EPs must be comparable to formal education in all aspects including curricula, certification, policy support, delivery mechanisms, educational standards and quality assurance, capacity building, learning assessment, and monitoring and evaluation.
7. **Credit transfer** – Credits from EPs must be transferable to formal education and vice versa.
8. **Flexibility** – EPs must be flexible in terms of curriculum content, the learning-teaching process, study time and evaluation.
9. **Lifelong learning (LLL)** – EPs must promote the principles of lifelong learning. They can serve the needs of individuals by including the provision of income generating programmes, education for life skills development and education for social and community development.

## Goals

EPs aim to equip learners with the moral, ethical, and intellectual capabilities to enjoy a good quality of life, the ability to undertake a career and to engage in continuous learning. The goals of EPs may be considered as follows:

- Providing alternative educational programmes equivalent to existing formal general/basic and vocational education, in order to achieve EFA goals,
- Providing educational access to all target groups and thereby strengthening basic human rights,
- Promoting and supporting human resource development by raising the educational levels of the total population,
- Promoting individual socio-economic benefits through comparable academic and vocational education and helping learners to become productive citizens,
- Promoting learners to become learning persons, with skills in searching for knowledge, assessing diverse learning sources, and integrating knowledge for development of self, family, community, society and the country.

## Quality Assurance

To ensure that EPs are comparable to formal education, educational quality must be subject to regular assessment through the use of standards and indicators.

Below are examples of EP quality assurance approaches in different countries:

### Thailand

Based on the national educational assurance system, the Office of Non-Formal and Informal Education (ONIE), Ministry of Education, Thailand, has set up standards and indicators for non-formal and informal education as follows:

Standards and Indicators of Non-formal and Informal Education (6 standards and 22 indicators)

#### **Standard 1: Philosophy, Vision, Goals/Missions, Objectives, Strategies and Educational Quality Development Plan**

*Indicator 1.1: Inter-relation between philosophy, vision, goals/missions, objectives, strategies and implementation*

*Indicator 1.2: Coverage of missions in educational quality development plan and annual action plan*

*Indicator 1.3: Monitoring and evaluation, and utilisation of the results in terms of improvement*

#### **Standard 2: Provision of NFE Basic Education (Equivalency Programme)**

*Indicator 2.1: Development of school-based curriculum*

*Indicator 2.2: Relevancy of materials and learning sources to the curriculum and learning activities*

*Indicator 2.3: Emphasis on learner-centered approach in learning provision*

*Indicator 2.4: Potential in provision of NFE of facilitators and educational personnel*

*Indicator 2.5: Quality of facilitators and educational personnel*

*Indicator 2.6: Knowledge and capacity of NFE graduates*

#### **Standard 3: Development of Curriculum and Programmes for Occupational Development, Life Skills and Development of Community and Society**

*Indicator 3.1: Development of curriculum relevant to problems and needs of the locality*

*Indicator 3.2: Relevancy of materials and learning to the curriculum and learning activities*

*Indicator 3.3: Potential in provision of learning of facilitators and educational personnel*

*Indicator 3.4: Appropriateness of facilitators and instructors*

*Indicator 3.5: Quality of learners/recipients*

#### **Standard 4: Provision of Informal Education (IFE)**

*Indicator 4.1: Quality of the provision of IFE*

#### **Standard 5: Management and Administration**

*Indicator 5.1: Quality of personnel development*

*Indicator 5.2: System of data for management and administration*

*Indicator 5.3: Capacity of administrator in organisational administration*

*Indicator 5.4: Quality of organisational administration*

*Indicator 5.5: Quality of internal quality assurance*

#### **Standard 6: Collaboration with Network Parties**

*Indicator 6.1: Participation in provision of NFE and IFE of the network parties*

*Indicator 6.2: Support and promotion for the network parties to provide NFE and IFE*

Of the 6 standards, standard 2 and 3 relate to EPs and are used for evaluation of quality of EPs. For evaluation of the quality of EPs, the ONIE has set up criteria for evaluation and criteria for scoring/rating as shown in examples below:

#### **Example 1:**

##### **Standard 2: Provision of NFE Basic Education (Equivalency Programme)**

*Indicator 2.2: Relevancy of materials and learning sources to the curriculum and learning activities*

##### **Criteria for Evaluation**

1. The educational establishment has diverse materials and learning sources relevant to the curriculum and learning activities.
2. The educational establishment has quality materials relevant to the needs of learners.
3. The educational establishment promotes, recommends and provides information for utilisation of materials and learning sources relevant to needs of learners.
4. The educational establishment evaluates learners' satisfaction in using materials and learning sources for improvement.

Criteria for Scoring/Rating		
Level of Score	Criteria for Evaluation	Evidence and Related Documents
1	Having criteria # 1	1. List of materials and learning sources
2	Having criteria # 1+2	2. Approval document on materials from the educational establishment committee
3	Having criteria # 1+2+3	3. Official document indicates formulation of committee for selection and approval of materials
4	Having criteria # 1+2+3+4	4. Report on satisfaction on using materials and learning sources 5. Records of using materials and learning sources 6. Record/Project for improvement of materials and learning sources

#### Interpretation of the Score Level Obtained

Level 1 – Needs Improvement  
Level 2 – Fair  
Level 3 – Good  
Level 4 – Very Good

#### Example 2

##### Standard 2: Provision of NFE Basic Education (Equivalency Programme)

*Indicator 2.4: Potential in provision of NFE of facilitators and educational personnel*

*Criteria for Evaluation*

Not less than 75% of facilitators and educational personnel:

1. have capacity in designing learning activities and writing lesson plan,
2. understand goals of NFE Basic Education (Equivalency Programme) provision,
3. are capable of using materials and educational technology to develop oneself and learners,
4. are capable of using appropriate evaluation methodology relevant to the learning situations and using the results for learners' improvement,
5. are capable of using classroom action research for development of the learning-teaching activities and learners,
6. are capable of arranging an interesting learning process for learners

Criteria for Scoring/Rating		
Level of Score	Criteria for Evaluation	Evidences and Related Documents
1	Having desired characteristics 0-2 items	1. Lesson plan 2. Report on the evaluation of learning design and lesson plan
2	Having desired characteristics 3-4 items	3. Project for personnel development relevant to the curriculum and the implementation of the curriculum
3	Having desired characteristics 5 items	4. Report of the supervision and the meeting 5. Portfolio of facilitators
4	Having desired characteristics 6 items	6. Report of facilitators' performance 7. Report of learners' achievement and satisfaction

#### Interpretation of the Score Level Obtained

Level 1 – Need Improvement  
Level 2 – Fair  
Level 3 – Good  
Level 4 – Very Good

**Source:** Standards and Indicators of Non-Formal and Informal Education Office of Non-Formal and Informal Education (ONIE), 2552/2009.

## Bangladesh

In 2010 Bangladesh outlined a formal plan for quality assurance of NFE/EPs, with key details as follows:

### Quality Assurance and Monitoring

Quality assurance and quantitative achievement as per target will be equally emphasised. To that end, there will be two types of monitoring - progress monitoring and performance monitoring. Progress monitoring will cover operational progress with respect to activity planned, and will be carried out through progress reporting. Performance monitoring will cover the performance of NFE learners in terms of attendance, drop out and achievement level according to learning objectives. Progress monitoring will be carried out monthly while performance monitoring will be carried out quarterly on the basis of learners' assessment records in NFE centres.

A participatory Monitoring and Evaluation (M & E) system will be developed at all levels, contributing to the flow of information both horizontally and vertically. M & E will include periodic testing and assessment of learners to monitor facilitation, and the effectiveness of curriculum and materials. An EMIS software-based central monitoring database will also be maintained. The database will assist project management teams in taking necessary corrective measures beyond in the literacy programme operation including NFE/EPs.

There will be provision for both internal and external evaluations of literacy programmes. Periodic evaluation of programme operation will be carried out every two years by an internal team with a representative of key stakeholders. The impact evaluation will be outsourced to professional study and research agencies.

### Action Plan

#### 1) Strategic activities

- Review of existing NFE programme monitoring instruments and process
- Development of exemplar NFE programme monitoring tools
- Development of prototype monitoring manual for use by central and district teams of the Bureau of Non-Formal Education (BNFE) and implementing organisations
- Developing/promoting user-friendly instruments
- Capacity building for systematic documentation
- Third party involvement in assessment of programme achievement
- Participatory monitoring mechanism to assess efficiency of internal operation and programme management

#### 2) Process

Sourcing out and workshop with stakeholders

### 3) Expected Output and Time-frame

- Existing NFE monitoring system of the BNFE and other providers are reviewed and study reports available to the stakeholders: by 2010
- Prototype monitoring manual is developed and distributed to NFE providers for use with necessary adaptation: by 2011

### 4) Responsibility

BNFE in association with NFE providers under the guidance of the Ministry of Primary Mass Education (MOPME).

**Source:** NFE Policy Implementation Plan (2010-2014), Bureau of Non-Formal Education, 2010

MODULE

**TWO**

**POLICY AND FRAMEWORKS**

## Policy

A policy is typically described as a principle or rule to guide decisions to obtain rational outcomes. EP policy refers to the laws and guidelines that govern the operation of EPs. Below are examples of EP policy from a variety of countries.

### India<sup>4</sup>

The National Institute of Open Schooling (NIOS) offers the Open Basic Education Programme as an equivalency programme for primary and upper primary levels through open and distance learning methodology. The eradication of illiteracy has been reflected in many policy documents in India since Independence. Reiterating this constitutional commitment, the National Policy on Education (1986) and the Programme of Action (1992) resolved that free and compulsory education of satisfactory quality would be provided to children up to 14 years of age before the 21<sup>st</sup> century.

As a manifestation of this national commitment, many education programmes have been launched. Since 2002, the Government of India has recognised the Open Basic Education Programme as a programme that is equivalent to formal schooling. The NIOS is the first and, at present, the only institution in the country to offer programmes from primary to senior secondary levels through open schooling.

### Indonesia<sup>5</sup>

Since 1970, Indonesia has promoted equivalency education as part of the non-formal education system. Over the years, legal provisions have stipulated the number of years required for compulsory education. Thus, in 1973/74 the Government declared the first six years of education to be compulsory. In 1989, the Government issued the Law of National Education System No. 2, which defined nine years of basic education (primary and junior secondary levels) as compulsory education.

It was, however, the enactment of the Act of the Republic of Indonesia No. 20 in 2003 on the National Education System that provided the impetus to support educational reform in non-formal education (NFE) in Indonesia. This edict reiterates the constitutional mandate of the right to education by stating that “every citizen has equal rights to receive a good quality education.” As a result of the various legal provisions, there are a variety of NFE programmes now on offer. The equivalency programme consists of Package A (equal to six years of primary school), Package B (equal to three years of junior secondary school) and Package C (equal to three years of senior secondary school).

4 *Ibid*, p.7.

5 *Ibid*, p.10.

### The Philippines<sup>6</sup>

In 1977, the Government institutionalized non-formal education (NFE) through the creation of the Office of the Undersecretary of NFE under the Ministry of Education, Culture and Sports (now called the Department of Education or DepED). The office of the Undersecretary for NFE is given responsibility to serve as the coordinating arm for integrating all programmes of various government agencies and NGOs involved in NFE. Due to various developments that have taken place to further strengthen NFE in the Philippines, there are now a variety of NFE and learning programmes and projects that respond to the specific and immediate needs of various client groups. The NFE Accreditation and Equivalency (A & E) system provides alternative means of certification of learning to Filipinos aged 15 years and above. Other government agencies such as the Departments of Health, Agriculture, Trade and Industry, National Defence, and Social Welfare and Development have developed and integrated NFE into their activities.

### Thailand<sup>7</sup>

Thailand gives high priority to education and recognises its importance for human and social development. As a result, NFE programmes of various kinds have been on offer over the years. A large number of organisations have supported NFE and their numbers have steadily risen. This support culminated in the National Education Act 1999, which states in Article 10 that people will have equal rights and opportunities to receive at least 12 years of basic education. Because of this Act, the Government has the mandate to cover all areas and target groups and to provide quality basic education.

Thailand’s long history with equivalency programmes dates back to 1940. Today, the levels of education reached by equivalency programmes include primary, lower secondary and upper secondary education.

6 *Ibid*, p.14.

7 *Ibid*, p.18.

## Frameworks

Below is an example of a framework for EPs in general:

### Vision and Mission

The vision of an EP can be stated as:

*To contribute to the creation of a learning society through the development of an educated, skilled and self-reliant human resource*

The mission can be stated as:

*To provide equivalent, qualified, relevant education that would widen access and provide certification so that the goals of Education for All are met within the National Framework for Action of the country*

### Objectives

In order to fulfill the above vision and mission, each country formulates its own need-based objectives. Some common objectives are as follows:

- to widen access to education for disadvantaged communities and support the completion of basic education and secondary schooling,
- to provide an alternate channel of education of an equivalent standard to the formal schooling system,
- to empower students through capacity building and skills development so that they can become self-reliant, and
- to improve life skills so there is an improvement in the standard of living and quality of life of communities.

### Legal framework for EPs

Various countries have legal provisions that are relevant to EPs. In Indonesia, the Constitution states that “Every citizen is entitled to receive education.”(Article 31, Verse 1). Based upon this philosophy, Article 26 of the Act of the Republic of Indonesia Number 20, Year 2003 on National Education System states that NFE covers, amongst others, equivalency education. In India, the Open Basic Education Programme is recognised as

equivalent to formal schooling. Thailand and the Philippines also have legal provisions relating to EPs.

### Target Groups

EP target groups vary from country to country but are commonly as follows:

- Children and adolescents in the age group of 6 to 17 years who are not enrolled in formal schools or have dropped out from school or who cannot go to school for some reason,
- Young adults who are aged 17 years and above who cannot now enroll in a formal school due to their age.

EP target groups may also include:

- Persons who are facing criminal charges and are in jail,
- Medically affected persons who cannot attend school and are house-bound,
- Sports players and others who have a special talent and are dedicated to that talent and cannot participate in regular fixed time schooling,
- Group of persons who have formed a learning community through flexi-learning such as home schooling or e-learning groups.

Reasons that prevent such persons from attending school may include:

- Difficult geographical terrain: for example, ethnic minorities living in isolated areas, people living in hilly areas, island people,
- Poverty: affected persons may include street children, the rural poor, urban slum people,
- Socio-religious factors: for example, students attending Islamic boarding schools with no formal education service in Indonesia, and Muslim girls studying in *madarassas* (schools for teaching Islamic law and theology) in India,
- Time factors: for example, employed persons who do not have time to attend regular school.



## Types of Programmes

EPs are offered at different levels, depending upon national educational policy, the formal schooling pattern, and other factors. However, EPs generally correspond to formal schooling levels as far as secondary level, i.e. until a learner completes his/her schooling. EPs cover both academic and vocational education subjects. Examples of EP types are given below:

### *Literacy/Post-Literacy*

Literacy programmes are conducted to develop reading, writing and numeracy skills as well as related functional skills. Literacy levels are often delineated in terms of Basic Literacy Level 1, Intermediate Literacy Level 2 and Advance Literacy Level 3. Teaching and learning methodologies usually focus on guided learning, peer/group learning and independent learning. Materials may be primers or modules that support the independent learning process. Literacy learning is often a first step on the road to learners continuing on to primary and secondary education.

### *Primary Education*

Primary education marks the initiation of a learner to the schooling system. In most countries, the target group for primary EP is 6 to 15 years.

EP curricula at this level are generally based on curricula taught in formal schools. Additional teaching in areas such as life skills is also often provided. Teaching-learning methods are specifically designed for the needs of learners, and may include face-to-face teaching, tutorials, distance learning or self-learning. The content is usually print-based but is often supported by audio-video materials, and radio and television programmes.

Teachers or tutors generally have certain minimum qualifications such as a Senior High School certification, professional training in education at the primary level, and competencies in teaching life skills.

### *Secondary Education*

The aim of secondary EP is to build upon the learning that takes place at the primary level. EP learners receive an equivalent education to that of formal school, opening up avenues to them for higher education. The target group for this level is generally people aged 15 and above.

Curricula include academic subjects as well as life skills learning. Many EPs also introduce vocational skills. Learning materials include print and other materials and learning is delivered through face-to-face classes, distance education, or tutorial methods. There may be provision for training at workshops and laboratories for vocational skills and for subjects for which practical learning is required.

In most countries, tutors/teachers have an undergraduate degree or diploma with a high level of proficiency in the subject matter and in life skills. Experience as an educator is also essential.

### *Vocational Education*

The target group for these programmes is generally those who are in the 15 - 18 age group, and those aged 18 and above who have an educational background of upper/senior high school. In India, vocational programmes have been included at the primary level for adult neo-literates so that they can be certified on their vocational skills.

In vocational EPs, skills development usually constitutes 70 to 80 per cent of course work, with academic (theoretical) knowledge taking up 20 to 30 per cent. The teaching-learning delivery mode includes a greater focus on hands-on practical training through face-to-face encounters. Courses often contain a large component of audio video support materials.

Teachers/instructors generally have an undergraduate degree/diploma relevant to the subjects taught. Teaching experience is also usually an essential requirement.

## National Framework Examples

### Thailand

The Equivalency Programme in Thailand dates back to 1940. It is now well recognised at national and international level. The framework is as follows:

#### Principles

The NFE Basic Education Curriculum B.E. 2551 (2008) has the following principles:

1. Flexibility in contents, studying time and learning process with the emphasis on integrating contents to actual ways of life of the learners, individual differences, and needs of the community and society
2. Promotion of equivalency transfer of educational results from formal, non-formal and informal education
3. Promotion of learners' development to undertake lifelong learning with the belief in learners' capability in self development/fulfillment
4. Promotion of network parties to participate in education provision

#### Goals

The NFE Basic Education Curriculum B.E. 2551 (2008) is aiming at developing the learners in the following aspects:

1. Ethics, morality, good value and ability to live peacefully in the society
2. Basic knowledge for daily living and lifelong learning
3. Ability in undertaking appropriate occupation in line with learners' interest, talent and changes in economics, society and politics
4. Life skills and ability to deal with oneself, community and society based-on the principle of sufficiency economy
5. Good understanding of Thai history, being proud of being Thai citizen, especially Thai language, arts, culture, traditions, sports, local wisdoms, good citizenship, practicing of religious teachings, democracy and constitutional monarchy
6. Public mind in conservation of natural resources and environment
7. Learning person with skills in searching for knowledge, assessing to diverse learning sources, integrating knowledge for development of oneself, family, community, society and the country

#### Target Groups

General public who are not in formal schooling system. They are group of the;

1. street children
2. imprisoned

3. workforce (aged 15-59)
4. disabilities
5. officers in service (conscripts)
6. farmers
7. elderly/aged
8. Thai hilltribes
9. local leaders
10. slum dwellers
11. Thai-Muslim people
12. religious practitioners (monks)
13. overseas Thais
14. compulsory education graduates who do not continue their further education
15. school-aged who lack formal education

#### Structure of the Curriculum

The NFE Basic Education Curriculum B.E. 2551 (2008) describes structure of the curriculum as follows:

##### 1. Level of Education

There are 3 levels of education, they are;

- 1.1 Primary Level
- 1.2 Lower Secondary Level
- 1.3 Upper Secondary Level

##### 2. Strands/Contents of Learning

2.1 There are 5 strands of learning, they are;

- 2.2 The Strand on Learning Skills
- 2.3 The Strand on Basic Knowledge
- 2.4 The Strand on Occupation Performances
- 2.4 The Strand on Skills for Living
- 2.5 The Strand on Social Development

##### 3. Activities for Quality of Life Development

##### 4. Standards of Learning

The NFE Basic Education Curriculum B.E. 2551 (2008) formulates standards of learning in accordance with 5 strands of learning to identify the quality of learners as follows:

- 4.1 Standards of learning based-on strands of learning  
 4.2 Standards or benchmarks of learning for each level to determine learning achievement of learners based on learning expectations of each subject in each level

### 5. Time Frame

Generally in each level, learners have to study for 2 years (4 semesters) except those who apply and succeed in equivalency transfer of educational results, it is compulsory for them to enroll and study for 1 semester.

### 6. Credit

40 hours of learning of each subject is equal to 1 credit

**Source:** NFE Basic Education Curriculum B.E. 2551 (2008) (Equivalency Programmes - EPs)<sup>8</sup>

## Bangladesh

A plan for an EP framework in Bangladesh has been outlined by the Bureau of Non-Formal Education (BNFE), Ministry of Primary Mass Education (MOPME), as follows;

### Establishing Equivalency Framework

Through NFE the literacy situation has improved significantly in Bangladesh, thousands of NFE learners, including neo-literates and primary school drop outs, have completed basic literacy courses in literacy centres. Learners in these centres are also gaining income-generating skills which will enable them to improve their standard of living. However, the acquired skills of NFE/literacy learners have no institutional or social recognition. Although there are opportunities for continuing education for NFE graduates, in the absence of any prescribed curriculum learners do not have an avenue of equivalency or access to higher education. In order to recognise the learning experiences of NFE learners, an equivalency framework is required.

An equivalency framework will be established through which learners' knowledge and skills gained through alternative learning programmes like non-formal education will be formally recognised to be equivalent to existing formal general or vocational education. The equivalency framework will enable individuals who have missed the opportunity to complete primary level and/or secondary level education, to acquire appropriate academic certification through a systematic accreditation process. Besides academic attainment, particular emphasis will be given to preparation of learners for the world of work and learning at their own pace based on their real life experience.

### Strategic Actions

- Deciding the levels of equivalency
- Developing curriculum framework and identifying core competences for each level
- Establishment of national authority for accreditation and equivalence
- Development of examination and accreditation (certification) system
- Affiliation of organisation/institutions offering courses under the equivalency framework
- Capacity building of affiliated organisations offering quality courses consistent with the national (equivalence) framework
- Administering examinations and providing credentials (certificates) to graduates
- Review of the process and revision of the framework, as required

### Process

- Review of the current grade levels in formal and non-formal primary and secondary education systems
- Two separate teams – one for primary education and the other for secondary education - to elaborate grade-wise, subject-wise, competence levels
- Review and finalisation of the curriculum and core competence through consultation and expert review
- Specifying the terms of reference, rules of procedures and authorities of the proposed national authority through a consultative process
- Enactment of law establishing the authority
- Formulating mechanism of awarding accreditation and equivalence
- Study of similar systems in other countries
- Formulation of exam rules, test administration system and frequency, student performance assessment procedures, process of communicating results
- Survey of potential organisations
- Setting standards and rules for affiliation
- Open call for affiliations and validation of offers
- According formal recognition of the organisations/institutions
- Capacity analysis of the affiliated organisations
- Organising training courses for affiliated organisations and for the national authority team members
- Exposure visit to other countries
- As per exam rules throughout the country

<sup>8</sup> Anamnat, W. 2009. *NFE Basic Education Curriculum B.E. 2551 (2008) (Equivalency Programmes – Eps)*. Sirindhorn Institute for Continuing Education and Development, Thailand. <http://www.siced.go.th/en/ebook/book-4-4.pdf> (Viewed 11 November 2011).

- q) Through a participatory evaluation and consultation process
- r) National workshop(s) for consensus building on the levels of equivalency

**Expected output, Timeframe and Responsibility**

- Policy framework on equivalency is finalised: 2010 (by MOPME jointly with the Ministry of Education)
- Curriculum framework for equivalency of various NFE programmes are finalised: 2010 (by BNFE jointly with the National Curriculum and Textbook Board, Directorate of Technical Education, Directorate of Secondary and Higher Education, and Bangladesh Open University)
- The law is promulgated establishing a national authority and describing its scope of work, to support learners from both NFE and formal education: 2011 (by MOPME jointly with the Ministry of Education, supported by the Prime Minister's Secretariat and approved by Cabinet)
- Rules and procedures of examination are circulated for public communication: 2011 (by national authority for accreditation and equivalence)
- List of affiliated institutions are circulated for public communication: 2011 (by national authority for accreditation and equivalence)
- Core team of the affiliated institutions are trained on the new system: 2011 (by National Academy for Educational Management and National academy for Primary Education in association with the national authority for accreditation and equivalence as well as training institutions run by non-government organisations (NGOs))
- NFE graduates have certificates from the new authority: 2012-13 (by national authority for accreditation and equivalence)
- Study report is available to policy makers and planning core team members: 2013 – 14 (by MOPME jointly with MOE)

**Source:** NFE Policy Implementation Plan (2010-2014), Bureau of Non-Formal Education

MODULE

# THREE

**CURRICULUM AND  
LEARNING MATERIALS**

EPs must ensure that educational parity is achieved between non-formal and formal education systems, while also ensuring that the specific requirements of non-formal learners are appropriately addressed. In particular, EPs must allow for learners to gain easy movement to and from the formal education system.

## Curriculum

### Goals of Curricula

EP curricula should aim at supporting individuals to become productive, contributing members to society and the nation. Besides enhancing learners' knowledge, EPs must provide skills in learning and in searching for knowledge, and must foster positive attitudes so learners are well equipped to deal with the rapidly changing world. Curricula should provide skills for critical thinking and problem-solving to deal with real life situations. EP curricula should open opportunities for higher education as well as prepare learners for livelihoods.

### Principles of EP Curriculum Development

Curriculum development takes place within the country context. EP curricula are generally designed in accordance to the national curriculum framework and education guidelines. However, common general principles for establishing EP curricula include;

1. **Relevance** – EP curricula must be relevant to national goals, and local and individual needs,
2. **Flexibility** – EP curricula must be flexible in content, time allocation, learning and teaching approaches and evaluation,
3. **Participation** – The development of EP curricula should include the participation of experts, stakeholders and holders of local wisdom who can help ensure that the curriculum is appropriate, relevant to learners' needs and promotes learner-centered activities,
4. **Comparability** – EP curricula must be comparable or equivalent to formal education curricula in all aspects, for example in learning outcomes, content areas, forms of teaching, and evaluation and certification,

5. **Credit transfer** – Knowledge, skills and learning experiences obtained from EP curricula must be readily transferrable to formal education or other non-formal education programmes,
6. **Diversity** – There must be a variety of EP curricula to meet the diverse needs and interests of EP target groups, for example, there should be curricula for basic education, income generation programmes, life skills development, and vocational skills training.

### Curriculum Development

An EP curriculum can be defined as the planned educational experiences offered by an educational institution. An effective EP curriculum must be relevant to the national socio-economic situation and must meet the needs of the learners and the society. The main purpose of a curriculum is to achieve the goals set out in the national education plan.

EP curricula design and construction vary from country to country, but all should begin with consideration of the following components:

- Objectives
- Learning experiences (Contents)
- Learning and teaching process
- Evaluation

EP curricula can be organised and developed at central or local level. Decentralisation and participation are now regarded as highly desired general principles. For EP design, this means including stakeholders such as teachers or facilitators, experts, learners, school/Community Learning Centre (CLC) committee members, local leaders, holders of local wisdom and so on. While a "Core Curriculum" can be developed at central level, a "School-based/Community-based Curriculum" must be developed at operational level/grass-root level in order to meet the real needs of learners and to promote localisation or the unique aspects of a community. The ratio of core curriculum versus school-based/community-based curriculum varies from country to country. In Thailand, the ratio is 70 to 30.

## Steps in Curriculum Development

Curriculum developers may consider the following steps:

- Identify target groups – who they are and where they are,
- Identify the needs of learners and the society,
- Study national education laws, the national education framework, national education standards and socio-economic trends to make a comparative matrix for outcomes of formal education and the EP curriculum,
- Identify learning and teaching contexts, i.e. infrastructure and existing learning-teaching materials,
- Review pedagogy and andragogy,
- Set goals and objectives,
- Organise contents,
- Select appropriate learning and teaching activities,
- Develop comparability matrix between EP and formal education curriculum,
- Develop an evaluation scheme,
- Try out the curriculum,
- Review and revise the curriculum,
- Publish and disseminate the curriculum,
- Follow up to get feedback for improvement.

## Levels of EP Curricula

EPs vary according to the country context but are generally created for four levels: literacy, primary, secondary and vocational.

### *Literacy/Post-Literacy Level*

The literacy curriculum generally draws upon the national literacy programme and its stated outcomes. Literacy programmes are generally divided into different stages of achievement. In Indonesia, the levels are as follows: Literacy Level 1 – basic literacy programme for illiterate learners

or beginners; Literacy Level 2 – intermediate literacy programme for those who finish Level 1; and Literacy Level 3 – advanced literacy programme for those who would like to continue primary education. In India, the National Literacy Mission conducts literacy programmes at three levels – Total Literacy Campaign (TLC), Post Literacy Campaign (PLC) and Continuing Education programme. In Thailand, there are two levels; Literacy Level 1 – basic literacy programme for illiterate learners or beginners and Literacy Level 2 – functional literacy programme – for those who would like to continue to primary education. Those who complete Level 2 can go on to complete primary level Grade 6 within two years.

Thailand	
Content Areas	Learning Topic
1. My Life	6
2. Happy Home and Happy Community	4
3. Dangers of Drugs	3
4. Sustainable Economy	6
5. Sustainable Environment	8
6. Community Development	5
7. Law in our Daily Life	3
8. Ethics and Morality	5
9. More Learning More Knowledge	3
10. Technology in our Daily Life	6
11. Energy	4
12. In-country Touring	6
Total	59
Structure of Functional Literacy Curriculum 2009	
<b>Conditions:</b>	
Functional Literacy comprises twelve content areas with 59 learning topics. Learners must pass 80 per cent or 47 topics before they can graduate. The duration of learning is not less than six months. This level is equal to Grade 3 in primary school. Those who complete Functional Literacy can go on to complete Grade 6 in primary level within two years.	

Indonesia	
<b>Functional Literacy Program for Adults</b>	
Topic	Functional Literacy Program
1	Spiritual values based on belief in one God, and mutual respect and tolerance for all people.
2	Mutual cooperation, planning, decision-making, critical thinking and democracy.
3	Functional capability in reading, writing, arithmetic and discussion in Indonesian Language.
4	Application of knowledge and skill for ecosystem sustainability, relation between cleanliness and health, food and nutrients.
5	Application of knowledge and skill in family planning, family health, child care, recreation, sports and social activities.
6	Application of knowledge and skill in order to increase household income from agriculture, small businesses and other jobs.
7	Active participation in social activities, knowledge of both local and national history, citizen's rights and obligation etc.
8	Development of local content and learner-generated materials.

**Source:** Adopted by the Directorate General of Out-of-School Education, Youth and Sports (DIKMAS), Ministry of Education and Culture in 1999<sup>9</sup>

### Primary Education Level

EP curricula for primary education vary from country to country. India offers an Open Basic Education system which has three levels – A, B and C, which are equivalent to primary level grades 3, 5 and 8. In Indonesia, the equivalent to primary education is a three-year programme called 'Packet A'. In Thailand learners spend two years to achieve a level equivalent to Grade 6.

<sup>9</sup> As cited in Asia-Pacific Cultural Centre for UNESCO (ACCU). 1997. *NFE Curriculum Indonesia*. <http://www.accu.or.jp/litdbase/curric/idn/index.htm> (Viewed 11 November 2011).

Thailand		
Structure of NFE Basic Education Curriculum B.E. 2551 (2008) (Basic Education Equivalency Programme) <sup>10</sup>		
	Primary Level	
Content Areas	Compulsory Subjects/Credit	Elective Subjects/Credit
1. Learning Skills	5	
2. Fundamental Subjects	12	
3. Vocational Subjects	8	
4. Life skills	5	
5. Social Developments	6	
Total	36	12
	48	
Quality of Life Development Activities	100 hours	

**Remarks:** The educational establishment must choose at least one elective subject with minimum 3 credits for learners to learn through project work approach.

<sup>10</sup> As cited in Anamnart, W. 2009. *NFE Basic Education Curriculum B.E. 2551 (2008) (Equivalency Programmes – Eps)*. Sirindhorn Institute for Continuing Education and Development, Thailand. <http://www.siced.go.th/en/ebook/book-4-4.pdf> (Viewed 11 November 2011).



Indonesia	
Equivalency Paket A Program (for children who are not in the formal Primary School System)	
Topic	Equivalency Paket A Program
1	Pancasila and Civics Education
2	Religion
3	Indonesian Language
4	Mathematics
5	Science
6	Social Studies
7	Arts and Handicraft
8	Health and Sports
9	Local Content and Skills

**Source:** Adopted by the Directorate General of Out-of-School Education, Youth and Sports (DIKMAS), Ministry of Education and Culture in 1999<sup>11</sup>

The Philippines		
Accreditation and Equivalency (A&E) Core Modules		
	Learning Strand	Elementary Level
LS 1	Communication Skills	10
LS 2	Science	34
	Math	6
	Problem Solving	28
LS 3	Sustainable Use of Resources and Productivity	6
LS 4	Development of Self and Sense of Community	26
LS 5	Expanding One's World Vision	6
	Total No. of Core Modules	116
Supplementary and multi-media materials are utilised in the conduct of Alternative Learning System (ALS) learning sessions for additional information and innovations. To date, the Bureau of Alternative Learning Systems (BALS) has developed 50 radio scripts for radio-based instruction and digitised the 120 modules for the <i>eSkwela</i> , the country's ICT-supported alternative education programme.		

<sup>11</sup> As cited in Asia-Pacific Cultural Centre for UNESCO (ACCU). 1997. *NFE Curriculum Indonesia*. <http://www.accu.or.jp/litdbase/curric/idn/index.htm> (Viewed 11 November 2011).

### Secondary Education Level

Similar to primary education level, EP curricula for secondary education vary from country to country. In Indonesia, a three-year 'Packet B' programme is equivalent to lower secondary education level. Another three-year programme, Packet C, is equivalent to upper secondary level education. In Thailand, the EP for lower secondary education lasts for two years and is equivalent to Grade 9. The EP for upper secondary education level lasts for two years and is equivalent to Grade 12.

India's Open Basic Education system offers EP up to the level C, which are equivalent to Grade 8. In addition to the Open Basic Education system, it offers two levels of EPs for secondary education. One is equivalent to Grade 10 and is the last stage of NFE for some learners. Others can continue additional two years to gain Grade 12 equivalent certificate. Learners choose different streams such as humanities, engineering, medicine, and commerce, and completion at this level is an entry point for university and for technical/professional studies.

In many countries education is compulsory only up to the lower secondary level. EPs must therefore be able to provide a total education ending at this level. The goals of the upper secondary curriculum are to prepare learners for either work or to pursue higher education.

Thailand				
Structure of NFE Basic Education Curriculum B.E. 2551 (2008) (Basic Education Equivalency Programme) <sup>12</sup>				
Content Areas	Lower Secondary		Higher Secondary	
	Compulsory Subjects/ Credit	Elective Subjects/ Credit	Compulsory Subjects/ Credit	Elective Subjects/ Credit
1. Learning Skills	5		5	
2. Fundamental Subjects	16		18	
3. Vocational Subjects	8		8	
4. Life skills	5		5	
5. Social Developments	6		6	
Total	40	16	44	32
	56		76	
Quality of Life Development Activities	100 hours		100 hours	

**Remarks:** The educational establishment must choose at least one elective subject with minimum 3 credits for learners to learn through project work approach.

<sup>12</sup> As cited in Anamnart, W. 2009. *NFE Basic Education Curriculum B.E. 2551 (2008) (Equivalency Programmes – Eps)*. Sirindhorn Institute for Continuing Education and Development, Thailand. <http://www.siced.go.th/en/ebook/book-4-4.pdf> (Viewed 11 November 2011).

Indonesia	
Equivalency Paket B Program (for children who are not in the formal Junior Secondary School System)	
Topic	Equivalency Paket B Program
1	Pancasila and Civics Education
2	Religion
3	Indonesian Language
4	Mathematics
5	Science
6	Social Studies
7	Arts and Handicraft
8	Health and Sports
9	English
10	Local Content (Skills)

**Source:** Adopted by the Directorate General of Out-of-School Education, Youth and Sports (DIKMAS), Ministry of Education and Culture in 1999<sup>13</sup>

<sup>13</sup> As cited in Asia-Pacific Cultural Centre for UNESCO (ACCU). 1997. *NFE Curriculum Indonesia*. <http://www.accu.or.jp/litdbase/curric/idn/index.htm> (Viewed 11 November 2011).

The Philippines		
Accreditation and Equivalency (A&E) Core Modules		
Learning Strand		Secondary Level
LS 1	Communication Skills	32
LS 2	Science	34
	Math	14
	Problem Solving	26
LS 3	Sustainable Use of Resources and Productivity	22
LS 4	Development of Self and Sense of Community	30
LS 5	Expanding One's	6
	World Vision	
Total No. of Core Modules		164
Supplementary and multi-media materials are utilised in the conduct of Alternative Learning System (ALS) learning sessions for additional information and innovations. To date, the Bureau of Alternative Learning Systems (BALS) has developed 50 radio scripts for radio-based instruction and digitised the 120 modules for the <i>eSkwela</i> , the country's ICT-supported alternative education programme.		

### Vocational Education Level

Provisions vary from country to country. In India, EPs offer vocational subjects in combination with academic subjects from the primary stage onwards (for adults). In Thailand, vocational subjects are introduced at all levels as part of the non-formal basic education curriculum. At the secondary education level, NFE learners are offered a programme in which a lower vocational education certificate can be earned. Learners can then continue to acquire an upper vocational education certificate at the commercial or technical colleges of the Office of the Vocational Commission. Completion of the upper vocational education would entitle learners to enter universities.

Thailand		
Structure of EP/NFE Vocational Education Curriculum 2004		
Subjects	Credits	Remark
1. General Subjects	26	
2. Vocational Subjects	66	
3. Elective Subjects	10	
4. Apprenticeship	-	one semester
5. Enrichment Activities	-	≥ 200 hours
Total	102	
<p><b>Condition:</b> This course is specially designed for workers in companies or factories to upgrade their knowledge and skills. The course is also available to learners who drop out from formal schools and vocational and technical college. The study time is 6 semesters or 3 academic years. Learners have to pass the standard vocational test of the Office of the Vocational Education Commission in order to gain the certificate.</p> <p>After finishing this level, all learners can apply for the higher level of vocational education at vocational and technical colleges or they can take an entrance examination to study in a state university or go to Open University or a private university.</p>		

### Learning Materials

EP materials should make learning informative, interesting and relevant to learners. Materials should encourage active learner participation, and should motivate learners to continue learning. Different mediums and formats can be used. Printed/written materials can include textbooks, periodicals, magazines, newspapers, handouts, posters, booklets, leaflets, and flip charts. Non-print materials can include audio-visual materials such as videos, audio tapes, radios, TV programmes, slides, and CDs. The use of ICTs, including computer-based instruction, digitalised materials, and virtual classes may also be used. Facilitators could also utilise real objects and situations, local wisdom persons and experts, nature and environment, exhibitions as teaching/learning materials. Local resources like public library, cultural centre, and museums could also be employed in teaching and learning.

## Material Development

Material development depends upon many factors, including learning objectives, age group to be taught, and evaluation strategies. Because of the flexible learning processes required by EPs, teaching materials are mainly self-instructional. Some facilitators prefer to use the same textbooks as those used in formal schools, as it is felt that this helps learners integrate better into formal schools. In some cases, facilitators can obtain learning materials from network partners such as public health centres, agriculture extension stations and public libraries. In countries such as Indonesia, India and Thailand, textbooks are specifically developed for EP learners.

## Material Developers

Material development can take place at both central and local levels, depending on the learning levels that apply. In India, the curriculum framework is developed at the national level and is followed by all educational institutions – formal, non-formal and open learning. EP course materials are generally produced at both national and state level. In many countries, educational institutions are encouraged to develop their own locally specific materials. Material developers may include local teachers, experts, learners, and members of school committees.

## Steps in Material Development

EP material development could follow the steps below:

1. **Needs Assessment** – developers identify the real needs of learners, and the objectives of the curriculum and each lesson.
2. **Material Preparation** – developers select and adapt existing materials or they develop new materials by themselves or with learners.
3. **Pre-test** – this stage is important for developers to judge the effectiveness of the materials and to plan for further improvements.
4. **Revision and Finalisation** – this stage helps save costs and makes materials more effective before circulation.

5. **Circulation/Duplication** – there are many ways of duplicating materials. Textbooks can be published by publishers while handouts or information sheets can be photocopied.
6. **Application** – using the prepared materials with learners and obtaining feedback for improvement.
7. **Evaluation** – evaluation helps improve the materials and the skills involved in preparing the materials.

When developing materials, EP developers must consider the following:

- **Simplicity** – materials must be simple and easy to understand. The level of language used must be appropriate to learners' levels. Contents should progress from less complicated to more complicated.
- **Illustration** – materials for children must have more pictures and be more colourful. For adults, charts and tables often help learners to understand the contents easily.
- **Practicality** – materials must be easy to use at the field level.

## Learning and Teaching Process

The learning and teaching process is more flexible in EPs than in formal education. EP facilitators must be skilled in designing and delivering appropriate learner-centered learning and teaching activities. Learner-centered approaches can include activities like group interaction, project work, portfolio development, role play, field trips, learning from local wisdom and learning from various sources outside the classroom. This kind of learning must be properly integrated into the overall learning process, and authentic assessment and paper tests must be administered in the right proportion and the right time. It is also vital that EP learners 'learn how to learn'.

EP learning and teaching methods can include:

- Self-directed learning – learners design their learning plans and study by themselves, with assistance and guidance from facilitators,

- Group meetings – as well as attending tutorials, learners can exchange knowledge and learn from each other at group meetings organised by facilitators,
- Distance learning – the educational institution sends learning materials to learners for self-study. This is often supported by educational radio and television programmes. Facilitators can also arrange supplemental or optional face-to-face lectures.

Effective EP approaches include<sup>14</sup>:

- Participant-centred learning, matched to local skills and the environment,
- Participant-centred management of learning, possibly with learning contracts made between teachers and learners,
- A competency-based framework for learning, complete with objectives, the learning outcomes expected,
- Acknowledgement of formal prior learning and learning experiences.
- Cultural sensitivity,
- Flexible curriculum and timetable to meet the diverse learning needs of children as well as adult learners,
- Assessment and evaluation which is transparent in administration, informative in diagnosis and non-ranking in publication,
- Teachers which are trained to provide services in accordance with the EP learning philosophy,
- Administrators cognizant of and sympathetic to the EP learning philosophy,
- Mutual respect for academic competence and attainment.

EP facilitators must be trained in teaching and managing diverse groups of students. Suggested teaching-learning elements for EP facilitators include<sup>15</sup>:

- Small numbers in classes,
- Modular learning, progressively, with entry, exit and re-entry points available,

<sup>14</sup> As cited in, UNESCO Bangkok. 2010. *Achieving EFA through Equivalency Programmes in Asia-Pacific: A regional overview with highlights from India, Indonesia, Thailand and the Philippines*. UNESCO Bangkok. Bangkok, Thailand. pp.3-4.

<sup>15</sup> *Ibid*, p.4.

- Learner-based (customized) lesson planning, which is self-paced and portfolio structured,
- Interaction between teacher and learners, and learners with each other (peer teaching),
- Learners interacting with other knowledge bases (e.g. the Internet),
- Relating new information with skills required or held,
- Relevant continuous assessment, primarily diagnostic for remediation.

MODULE

**FOUR**

**CAPACITY BUILDING**

EPs provide a parallel system of education that requires a high level of competency from implementers. In particular, the flexible requirements of EPs demand special training and skills above and beyond those found in formal education. Achieving a proper match between job requirements and staff capabilities is critical at all levels of EP management and for all types of jobs within a programme. Thus capacity building is vital for the success of any EP.

## Capacity Building

Capacity building is a long-term process of enabling an individual or groups to develop, improve and strengthen their knowledge, skills, competencies and attitudes in the performance of their roles, duties and responsibilities in their assigned work. It has to be a continuing collective effort, participatory, regular and flexible for all EP practitioners involved. In addition to pre-service capacity building, opportunities to continuously enhance their knowledge, skills and competencies are to be systematically provided.

The delivery and implementation of EPs call for the highest degree of quality assurance from both government programme holders and community-based implementing partners. The complexity of EP implementation, the diverse requirements for accreditation and equivalency, and the higher learning goals of learners are just a few of the major challenges that need to be considered when developing a strong capacity building programme.

Initiating a new EP requires providing training that will produce the following personnel and skills:

- Education planners who will design and develop the policy framework and delivery modalities of the EP,
- Curriculum developers whose orientation is geared towards non-formal education, and who understand the goals of an EP,
- Instructional materials developers who will produce learning materials that are practical, simple, easy to understand and responsive to the learning needs of diverse groups of learners,

- Government and implementing partners who will understand and accept the significance of the EP in responding to the educational needs of those who have traditionally been excluded and marginalized because of poverty, disability, gender and isolation,
- Implementing partners, from the government and the private sector, including staff and members of NGOs, Community Service Organisations (CSOs) and CLCs whose members will understand, internalise and implement quality delivery mechanisms,
- Adult facilitators who are the direct providers of the instruction and who will be aware of their roles, functions and responsibilities in effectively discharging their diverse functions.

## The Four Ds Steps in EP Capacity Building

The first step in capacity building and development is to determine capacity needs. This starts with asking questions such as; “What is the current level of skills and competencies?” and “What ought to be done to ensure these are developed, improved and strengthened?”

A four-step general approach to capacity building processes is outlined in the CLC Planning and Management Handbook<sup>16</sup>;

### 1. Diagnose and Determine Capacity Gaps and Needs

This involves determining and defining job requirements against the level of workers’ current knowledge, skills and competencies. It begins with carrying out a job or task analysis (the orderly study of job requirements and facets that can influence performance results). This can cover;

- Tasks carried out in the job,
- Work tools; i.e. machines, tools, and other work aids,
- Job-related tangibles/intangibles; i.e. knowledge applied, materials processed, products or services performed,

<sup>16</sup> UNESCO Bangkok. 2003. *CLC Management Handbook*. UNESCO Bangkok. Bangkok, Thailand.

- Job context; i.e. work schedules, physical conditions, social relations and compensation,
- Performance standards; expected output in quantity and quality,
- Personal requirements; i.e. educational qualifications, training, skills, experience and other attributes.

After a job or task analysis, capacity gaps are identified. An example of a potential gap is where it is found that materials developers who have been trained to produce materials for formal schools are not yet skilled in preparing materials appropriate for the flexible requirements of an EP.

## **2. Designing a Capacity Building and Development (CBD) Programme**

The CBD design and development process is shaped by the results of the tasks or jobs analysis. Design and development outcomes must be appropriate for the specific type of EP and for the needs of learners. A capacity building plan may include consideration of the following;

- Objectives,
- Target groups,
- Timeframes and milestones,
- Processes and methodologies,
- Resources needed,
- Monitoring processes,
- Evaluation,
- Reporting systems, feedback and utilisation.

## **3. Delivery and Conduct of Capacity Building Activities**

Active engagement between trainees and trainers is an important part of the delivery of capacity building. It is important to realise the empowering dimension of capacity building, especially in relation to local people who should be actively involved in their own institutional and personal growth and development. Training should be customised to the demands of

trainees' jobs and their capacities as EP workers. It should also be geared to unlocking the potential for partnerships between implementers, learners, communities and stakeholders that is vital for effective delivery of an EP. Before planning the delivery method of a capacity building activity, collect potential trainees' feedback on the following;

- Objectives of the capacity building approach,
- Scheduling and timeliness,
- Methodologies,
- Resource persons and specialisations,
- Monitoring and follow-up activities,
- Evaluation processes and utilisation.

## **4. Discern and Evaluate Results**

Training activities require immediate and continuing evaluation of outputs and outcomes. Key questions include: "have trainees achieved the training objectives?" and "is the EP organisation now better equipped to succeed?" This process and the results of evaluation must be shared and discussed with trainees before being reported to supervisors and above.

### *Roles and Responsibilities of EP Personnel*

For EPs to deliver the high standards of education, required implementers must be equipped with appropriate competencies, starting with an awareness of their roles and responsibilities. A summary of possible roles and responsibilities of institutional and individual EP stakeholders is given below. It can serve as a reference point for sources of inadequacies in delivery and performance as a result of capacity gaps.



## EP Roles and Responsibilities

Equivalency Programme Stakeholders	Roles and Responsibilities
Government: • National	Highest level in the EP Structure which reviews and approves policies, guidelines and framework in the operationalisation of the EP. <ul style="list-style-type: none"> <li>• Policy formulation and approval</li> <li>• EP management and development approval</li> <li>• Annual budgetary approval</li> <li>• Resource generation and allocation</li> <li>• Programme development implementation plans</li> <li>• Resolution of major problems and concerns</li> <li>• others</li> </ul>
EP Administration: • National • Regional • Provincial • Local	They are directly under the office of the Ministry of Education and within the NFE Department. <ul style="list-style-type: none"> <li>• EP development and management</li> <li>• Curriculum and instructional materials development</li> <li>• Prepare EP standards and policy guidelines</li> <li>• EP service contracting of implementing partners</li> <li>• Technical assistance to partners</li> <li>• Programme planning and implementation</li> <li>• Monitoring and evaluation</li> <li>• Financial management, audit and controls</li> <li>• Advocacy and social mobilisation</li> <li>• Technical reports and documentation</li> <li>• Technical review and approval of project proposals</li> <li>• Capacity building for national EP personnel and implementing partners</li> </ul>
EP Implementers	These groups may represent actual service providers which are either governmental and/or from the private sector like CLCs, NGOs, CSOs, peoples' organisations, and local government units.  Their funding requirements are either sourced from grant agreements from the government and ministries, international donor agencies, corporate grants, endowments, etc.

	<ul style="list-style-type: none"> <li>• Project implementation: planning, organising, directing, monitoring and evaluation</li> <li>• Project proposal and technical writing</li> <li>• Development of project systems and procedures</li> <li>• Recruitment, selection, and training of project staff and facilitators</li> <li>• Capacity building of personnel and staff</li> <li>• Monitoring and evaluation</li> <li>• Reports and documentation</li> <li>• Instructional materials development, reproduction and distribution</li> <li>• Financial management and controls</li> <li>• Resource generation and mobilisation</li> <li>• Partnership building and linkages</li> <li>• Advocacy and social mobilisation</li> </ul>
EP Adult Facilitators	<p>EP facilitators are employed by service providers (from the government or the private sector). They are in the front line of service delivery. They are contracted to provide learning support to learners under their responsibility.</p> <ul style="list-style-type: none"> <li>• Advocacy and social mobilisation</li> <li>• Recruitment and motivation of potential learners</li> <li>• Enrolment interview and leveling of prior learning</li> <li>• Identification of learner's learning goals</li> <li>• Conduct of learning group sessions</li> <li>• Supervision of self-learning activities</li> <li>• One-on-one tutorials</li> <li>• Conduct of guidance and counselling sessions</li> <li>• Class sessions/lesson planning</li> <li>• Learners' assessment</li> <li>• Learners' portfolio preparation and assessment</li> <li>• Home visitation</li> <li>• Group activities and field trips</li> <li>• Resource generation and mobilisation</li> <li>• Conduct of community-based assembly with parents and community leaders</li> </ul>

## Capacity Building and Development Methods

Various training methods and a mix of methods may be suitable for EP capacity building, depending on the context. These include:

- Training Workshops – usually of two, three or at the most ten days duration, with a mix of training methods integrated within a definite set of training objectives, guided by a fixed training design for a specific group of identified participants, purposely to train on pre-selected topics, methodologies defined and materials developed and distributed with an end-of-training evaluation packaged therein,
- On the Job Training – the teaching-learning process is undertaken on site, on the job, and training is undertaken through observation, and continuing demonstration of specific skills and job routines, duties and responsibilities. The trainer is usually an employee with specific appropriate expertise,
- Mentoring and Coaching – the process involves a mentor/trainer tasked to teach and facilitate the learning of a new employee, constantly giving advice and counsel the trainee, continuously demonstrating competency and skills, monitoring the learning progress of the trainee and giving feedback,
- Peer Counselling – this is usually carried out by two individuals holding similar job tasks, duties and responsibilities. They learn from each other by sharing experiences and expertise,
- Team Teaching – a method of facilitating learning of two EP practitioners/facilitators. Specific lessons of interest are handled, taught, facilitated and shared by one of the pair. It is appropriate when one member is especially competent in a given specialisation,
- Observations and Field Visits/Outdoor-based Learning – any teaching-learning activity, exercise or simulation that can be conducted outside the traditional learning environment. Designed to provide a particular group of individuals with actual exposure, observation and discussion based on a field visit,
- Meetings and Dialogues – informal or formal, structured or unstructured meetings of a group of people, with the same work responsibilities and tasks. Participants share work methods, experiences, problems faced and ways of performing difficult duties. Carried out regularly with proper documentation and recording, this can be a good avenue for improving skills and work performance,
- Documentation and Report Writing – this can be a major means of developing skills and competencies in writing and communication and upgrading of facilitators in their report writing skills. Learning is facilitated by discussion of substance/subject matter presentation, on reporting styles, construction (grammar) and sequential arrangement of ideas and topics. Feedback and follow-up support must persistently provide for application and improvement,
- Attendance in Forums and Conferences – teaching-learning is facilitated by participating in fora or conferences with identified leaders in the field, who share their experiences. Information and ideas can be replicated, modified or customised by the learner or participant, according to their needs. Attendance should involve participants producing written reports on lessons learned and plans for application,
- ICT and E-learning – the latest trend in teaching-learning enables individuals to learn alone with the use of self-directed modular learning packages using computers, videos and technical innovations,
- Study Grants and/or Scholarships – this type of capacity building involves a longer term training and is usually undertaken with a formal education provider such as a university and/or an institute of higher learning.

In any form of capacity building, the key principle is to make the process a simple, practical, easy and enjoyable means of developing competencies. The ways in which trainees are trained, provide a model that they will follow in their own work.

## Trainees' Achievement, Measurement and Evaluation

Capacity Building and Development (CBD) includes measurement and evaluation of the process and the results. As well as determining whether trainees have achieved the desired level of knowledge or skills, this involves discerning whether the training activity identified was appropriately designed and delivered, what benefits accrued, whether costs were appropriate and other aspects.

There are two key aspects to the process a) measurement or assessment and b) evaluation.

Measurement or assessment indicates the things that we can observe and count. It is mainly quantitative. Relative to an EP, it could include for example measuring trainees' background knowledge and skills in NFE facilitating and teaching methodologies.

Measurement should be carried out in four stages;

1. When carrying out the training needs analysis, to indicate capacity gaps,
2. During training, measurement can illustrate whether capacity building goals and session objectives are being met and allow corrective measures to be taken,
3. At the end of training, paper tests or skills demonstration discern whether training goals have been achieved,
4. When a trainee has returned to the workplace. Follow-up or post-training measurements are carried out through observations and assessment of work performance and productivity, efficiency and effectiveness in carrying out assigned tasks.

Evaluation refers to the assumptions or judgments we make from the results of the measurement. Following a training course, we should have some form of scale against which to measure trainee achievement. This scale would be comparable to the scale used during the training needs analysis, to allow an evaluation/judgment of how effective the training has been.

There are three stages in the evaluation of an EP capacity building training or activity. They incorporate the WH questions: what, why, when, where, and whom, and how.

- Focusing – this concerns what and why we want to evaluate, such as the amount of improvement in the trainee, level of skills and competence acquired, effectiveness of training and mentor, relevance and cost-effectiveness of the training, results and outcomes of the training, and adequacy and appropriateness of scope and coverage of the training.
- Analysing – covers the information needed and answered by the questions of what, how, from where and from whom should data be sourced, such as level of knowledge before and after the course, expectation of training outcome, sources of information, and methods of collecting the information and data needed.
- Managing – the final stage which is concerned with interpretation and final analysis of information and data gathered. The outcome of evaluation will inform whether a programme has achieved its expected results and goals.

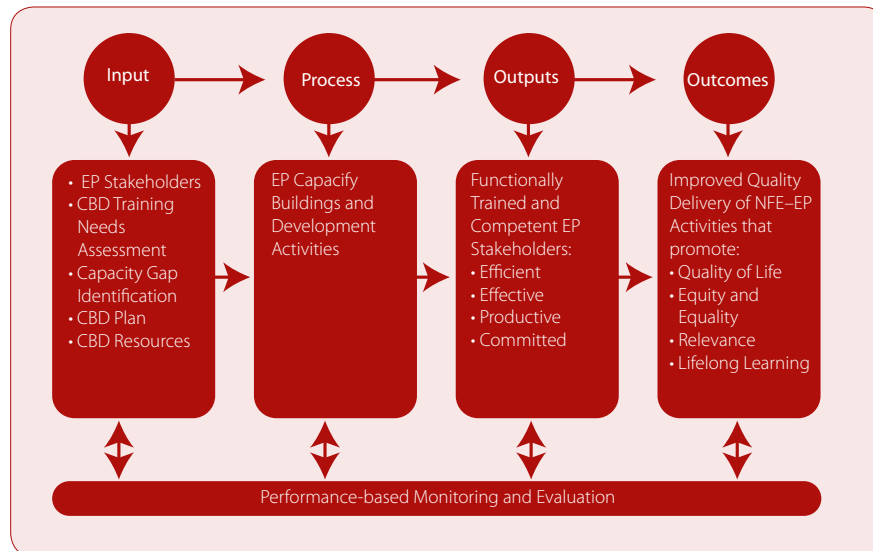
Results of assessments and evaluations should be shared with participants before being sent to management, so they can see, understand, accept and confirm the report.

The CBD framework below encapsulates the process of empowering EP stakeholders on an ongoing and regular basis. It is important that the process includes strong records management. This means;

- Keeping an adequate record of all CBD information, activities, achievements and expenditures, so that it is possible to maintain control over the work and to plan with some certainty,
- Periodically analysing the recorded or reported information in order to see how much progress is being made and to identify tasks that may need extra attention,
- Making accurate and timely reports. Reports should be the by-products of the analysis of records, which is the most important activity in monitoring and evaluation. Consolidation, analysis and reporting are required activities,

- Ensuring that appropriate actions are taken on the basis of monitoring and evaluation information and analysis. This includes checking the accuracy and validity of data, providing feedback and calling for immediate action for areas that need particular attention.

**Figure 1: Capacity building and development framework for EP stakeholders**



MODULE

# FIVE

**FACILITATORS: QUALIFICATION  
STANDARDS AND CAPACITY  
BUILDING NEEDS**

Facilitators are the key to the success of EPs. In many countries, facilitators are individuals who belong to the local community, usually with limited prior training and preparation. Some may be volunteers who receive minimal compensation and who therefore need to be kept motivated throughout the programme. Facilitators require quality training in adult education principles and NFE methodologies.

## Facilitators and Teaching of Adults

A large percentage of EP learners are adults who have dropped out of school or are continuing their education after a time gap. They often have a rich set of life experiences despite their lack of formal education. Adult learners are generally in a position to decide what they want and what they need to learn, based upon their life situations. They are often motivated to learn only if learning satisfies their direct needs and interests.

Adult learning is a process of problem-finding and problem-solving to discover “where we are now” and “where we want to go.” In general, adults will respond to a subject that is specific, practical and current. Hence, learning is “problem-centered” rather than “subject-centered.” It also needs to be “learner-centered” more than being “teacher-centered”. This is why non-formal educators are called facilitators and not teachers.

It has been noted that adults follow a relatively predictable pattern or cycle while undertaking any new learning. Some features of this pattern are as follows:

- **Awareness and activity** of the learning lesson focuses on a situation or condition that is desirable or undesirable, that needs to be addressed to improve the situation and bring it to the desirable level. This is the initial step towards active learning of adults,
- **Exploration and analysis** is the process of figuring out the causes, elements or components of what is being learned. In the EP learning class, lessons are based upon actual life experiences and are presented for discussion and further learning,

- **Inquiry and abstraction** is that phase of learning where adults inquire into, critically reflect upon and compare their own behaviour or attitudes to what is observed in their situation and take a decision based upon different options,
- **Utilisation and application** takes place when learners are able to use what they have learned for multiple purposes. It is when learners have the opportunity to become aware and develop interest, to explore and inquire, that the learning becomes functional for them.

Research has shown that adults have a deep need to be self-directing and, therefore, tend to resent being put into situations that violate their self-concept of maturity, such as situations in which they are talked down to or treated like children. Facilitators need to recognise that the life experiences of adult learners are rich resources for adult learning. Hence, the core methodology for teaching-learning is the analysis of those experiences and relating them to current lessons and learning.

In order to respond to the demand, facilitators need to be well trained. They should for example be able to conduct forums, using multi-directional techniques such as group discussions, simulations and role playing, and buzz sessions. Facilitators should be able to devise appropriate content for adults that will be the starting points for organising adult learning activities.

## Critical Issues that Affect Training of Facilitators

Facilitators’ performance is the key determinant of whether learning will occur successfully and sustainably. Sometimes facilitators’ preparedness to handle, organise, manage and conduct classes is constrained by their lack of prior training and knowledge of educational theories and techniques. Facilitators’ performance is also affected by their circumstances.

Compared to formal school teachers, facilitators may receive low compensation and at times only teach on a volunteer basis. They may lack formal qualifications and may have no job security. They may have minimal

prior training opportunities and little professional development support. Most training courses are short-term, often just for three to seven days duration. Training formats and course content may be of a lower order than the more rigorous trainings that are mandatory for formal school teachers.

The often low status of facilitators and level of priority sometimes given by the educational authorities to non-formal education also affects performance and hinders progress in goals around Education for All.

## Qualification Requirements

Facilitators are required to provide learners with encouragement, motivation and inspiration to engage in lifelong learning. The higher order learning needs of EP learners call for special qualifications, levels of educational attainment, orientation and more particularly Knowledge, Attitudes, Values and Skills (KAVS).

'Qualification Requirements', sometimes referred to as 'Qualification Standards', indicate the basic requirements that an EP facilitator must possess to qualify for EP employment. Most countries implementing EPs have identified specific qualification standards. An example from the Philippines is given below:

The Philippines
<p>Qualification requirements or desired characteristics by the Department of Education, Bureau of Alternative Learning System of EP Adult facilitators, described as Instructional Managers.</p> <ul style="list-style-type: none"> <li>• Must be a 4-year degree holder preferably with education units; with experience in non-formal education or community organising,</li> <li>• May be drawn from a range of professions and backgrounds,</li> <li>• Most likely, they are elementary or secondary school teachers or guidance counselors,</li> <li>• They could be retired school teachers or qualified community development workers, and</li> <li>• If employed by DepEd, they must secure the approval of their school principal or their immediate superior.</li> </ul>

**Source:** Department. of Education, Bureau of Alternative Learning System, Accreditation and Equivalency Manual of Operations

A number of NGOs implementing EPs in the Philippines who comply with the Department of Education requirements have also included the following institutional requirements:

- Must be a resident of the municipality where the EP is to be implemented,
- Preferably of the same ethnicity of the learners of the learning class,
- Be fluent in the languages of instruction (national and/or local language), and
- Must be willing to sign and be committed to the provisions of the learning contract and employment as they are receiving compensation for their services as EP facilitators.

## Facilitator Skills and Capacity Building

The task of facilitating is different to that of teaching. However, in practice, many facilitators fall back on traditional teaching methods used in formal schools, which has a discouraging effect especially on adult learners. Concentrated efforts to promote active and participatory experiential methods are needed in order to stimulate the interest of learners. For this, facilitators must be properly trained and motivated.

Given that EP learners have a variety of higher needs, and may be mixed in terms of educational levels, facilitators must be skilled in adopting a multi-grade approach. Some of the requirements of an effective facilitator are as follows:

- Ensure active and participatory learning through the effective flow of communication within the group of learners,
- Encourage critical thinking by posing problems for group analysis,
- Motivate learners to think critically and motivate them to take concrete actions,
- Be sensitive to the needs of learners, in both verbal and non-verbal communication,
- Be respectful and perceptive to the feelings, gender, attitudes, culture, interests and or any problems that may occur with any learner or group of learners, and

- Understand the value of NFE and the EP and the aim of giving educational opportunities to those who want to continue their studies.

A good and effective EP facilitator is never content with the knowledge and skills he or she has. Facilitators are aware that learning new knowledge and acquiring new skills for competency is a continuous process. Facilitators need to be open to all sorts of ideas and insights, be observant, and be ready to absorb and learn from any activity they are faced with. They must be keen to test and try new techniques of facilitation and gain knowledge from their own life experiences and those of others. They should welcome opportunities to further their learning and to try new ways to improve their trade and profession.

CBD for facilitators, whether in groups as in a training workshop or on a one-on-one peer counselling or mentoring and coaching or in any mode of training, must be:

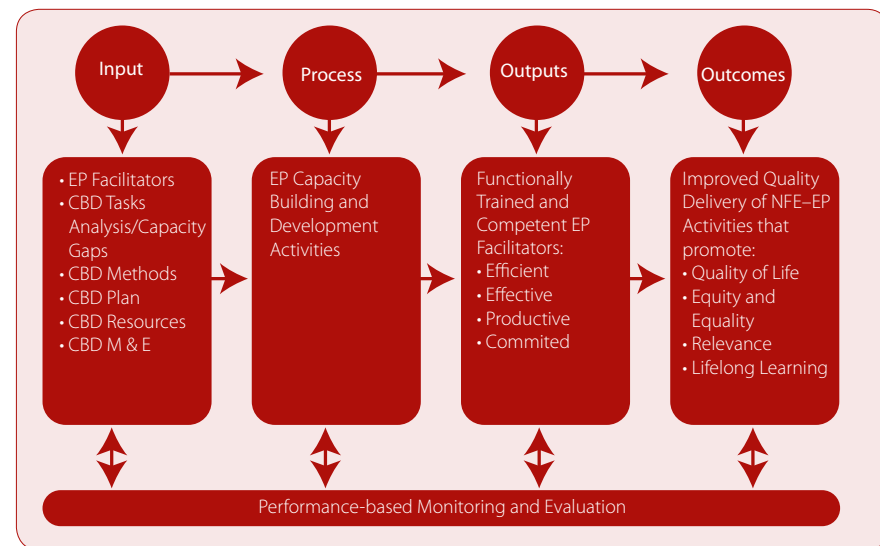
- **Participatory** – involvement of the trainees in the design and decision-making process so they are a source of information sharing their cultural wisdom, culture, and diverse life experiences,
- **Inclusive** – enabling all facilitators, irrespective of position/status, culture, religion, race and specially gender to have equal opportunity and access in availing of CBD activity,
- **Practical** – focus is more on application of skills and knowledge and less on academics and high-sounding theoretical approaches,
- **Doable** – allows the learner/trainee to immediately apply, utilise and put into action the learning gained and new skills acquired,
- **Relevant** – provides meaningful and competency-based training that is responsive to her/his job requirements and need for new knowledge and skills,
- **Innovative** – creative and interesting approaches that promotes hands-on participation in skills-building exercises,
- **Experiential** – choice of training topics for new knowledge and information are built from field experiences as EP practitioners and from their personal lives, and

- **Enjoyable** – learning must be educative, easy and enjoyable to promote better absorption, adaptation and utilisation.

## Performance-based Monitoring and Evaluation of Facilitators

A good CBD process requires solid commitment on the part of top management and must follow a well-conceived plan.

**Figure 2: Capacity building and development framework for EP facilitators**



Performance-based monitoring and evaluation of EP facilitators is a continuous process, which does not stop when the formal training sessions end. Monitoring makes it possible to examine whether the training has been absorbed and the new knowledge is being applied to bring about changes in attitudes and to actuate new behaviours and skills.

There is a need to continually ask the question, “Is it working the way it is supposed to?” Further questions that can be inquired into include: “Are



the facilitators' skills and competencies properly matched with the task of teaching-learning of learning modules? Are they thoroughly prepared, familiar with the EP content and comfortable with EP methods of delivery of instruction? Is content instruction of the EP learning modules correct, accurate and factual?"

Other issues to be monitored include facilitators' attitude towards the training, the amount of learning that has taken place and on-the-job application of the learning. All of these "little things" can make a big difference to the success of the EP system.

Performance-based monitoring and evaluation can be carried out in many ways: follow-up interviews, discussion groups, feedback sessions, questionnaires, and even surveys to measure the participants' attitudes. The process of measuring and evaluating trainees' learning of skills can be carried out before and after CBD training, with class observations to further determine impact of training. Learners may be asked to assess the facilitator's performance.

An example from the Philippines shows how monitoring of Instructional Managers is conducted within one NGO:

**Notre Dame Foundation for Charitable Activities, Inc.  
Women in Education and Development  
Cotabato City  
Performance Evaluation Form**

*The Rater should accomplish the section and then the IM/Facilitator will give some vital information.*

IM/Facilitator: .....

Project Title: .....

Learning Center: .....

Literacy Level: .....

Class Schedule: Day.....Time:.....

Start of Classes: .....Approx. End of Class: .....

Total No. of Enrollees: .....No. of Learners' Attendance: .....

Learning Materials Being Used:

a.....

b.....

c.....

d.....

Learning Class Topic of the Day:

.....  
.....  
.....  
.....

Rate the Facilitator's competency level based on your observations using following scale:

**5** = Excellent    **4** = Very Good    **3** = Good    **2** = Fair    **1** = Poor

Performance Area	Level of Performance				
	5	4	3	2	1
1. Motivation • Sustains enthusiasm • Generates interest					
2. Teaching-Learning Activities • Integrates content with learners' context • Uses appropriate or structure facilitating strategies • Uses appropriate or creative learning materials • Encourages adequate discussion					
3. Monitoring and Evaluation • Keep learner's progress records, attendance records including learner's portfolio • Conducts follow-up (e.g., interviews, home visits) • Uses appropriate evaluation tools					
4. Group Organising/Structuring • Keeps group session as agreed upon • Allots adequate time for each activity • Uses varied learner group structure schemes					
5. Management-Related Tasks • Files project documents systematically • Coordinates with project officials regularly • Discusses evaluation results with stakeholders (e.g. service providers, local government units, DepEd)					

Remarks:

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M's/Facilitator's Signature:.....

Date:.....

Rater's Signature:.....

Date:.....

Confirmed by.....

Date:.....

*Barangay Captain/Contact Person*

MODULE  
**SIX**

**DELIVERY MECHANISMS**

An EP may be well conceived with the best possible intentions, but ultimately it is effective delivery that makes it a success. If the delivery mechanism is unsuitable and weak, the programme will not be sustainable. Policy makers must plan appropriate delivery structures from the initial stages, keeping in mind national EFA goals and available resources.

## Revisiting the Target Groups

EP learners generally belong to two categories:

1. Children who have dropped out of the formal school system and are re-entering the educational stream or have never gone to school.
2. Youths and adults who are school dropouts or have become literate under a national literacy programme and want to continue/strengthen their education or enhance their livelihoods opportunities.

## Choosing an Appropriate Delivery Mechanism

When choosing a delivery system policy planners have to take into account the target group, available resources, supporting infrastructure and socio-cultural and religious sensitivities. Some key factors include;

- National Goals and National Educational Policy – Each country has to choose a delivery system and an implementation structure keeping its overall national education visions and mandates in sight. EPs are a key factor in governments achieving educational targets.
- Existing Educational Structure – The design is affected by the existing educational structure. In some countries, such as Thailand, EPs are conducted through Non-Formal Education Departments, while in others, such as Indonesia, there are fully-fledged Directorates of Equivalency Education. EPs are also being conducted through Open and Distance Education institutions as in India. In many countries, formal government schools have been extensively used for the conduct of EPs. In some countries, there has been involvement of non-government organisations. Similarly, decisions regarding facilitators are also dependent upon the existing cadre in the country.

- Country's Available Resources – It is important to make a fair assessment of the available resources and whether those will be made available for EPs. For instance, before a country embarks on a computer-based programme, it would be necessary to review the extent of the electricity available. Similarly, while planning a programme that uses extensive audio video technology, it should be examined whether there are facilities for using audio video players in schools.
- Target Group's Accessibility to Resources – The target group of EPs is varied and includes those that are marginalised. Before any technology is adopted for delivering an EP, research must be conducted to find out the accessibility of that technology for the target group. For instance, it should be decided whether the technology will be used by learners at home or at a study centre.
- Costs – While selecting a particular delivery technology, cost is one of the determining factors. Planners have to check whether the technology is affordable. If it is to be used at home the individual learner should be able to purchase it. If it is to be used at study centres, the government will have to do a cost-benefit analysis and then take a decision.

## Modes of Delivery

The essence of EPs is to provide education that is of a similar level and quality as formal education. Delivery modes can include:

- Face-to-face Teaching through Formal Schools – In some countries, EPs are conducted through face-to-face teaching with teachers who are engaged to take regular classes. Classes are held in regular formal schools, the difference being that the programmes are flexible, learners have choices and the teachers follow the EP curriculum.
- Facilitator-managed Learning at Community Learning Centres – In some countries EPs are seen as a continuation of basic literacy programmes and are available to learners who want to continue their education up to a higher level. Here, the centre of activities continues to be the venue where literacy learning takes place, often either a CLC or a formal school.

The key person is the facilitator who creates an appropriate safe, secure and comfortable environment. The facilitator also needs to be able to identify difficult to reach groups in the village so that they can be encouraged to join. S/he has to plan the programme and hence should be able to identify available resources. Facilitators could be para-teachers, volunteers, CLC facilitators/Instructional Manager, retired persons, unemployed youth and officials of government departments.

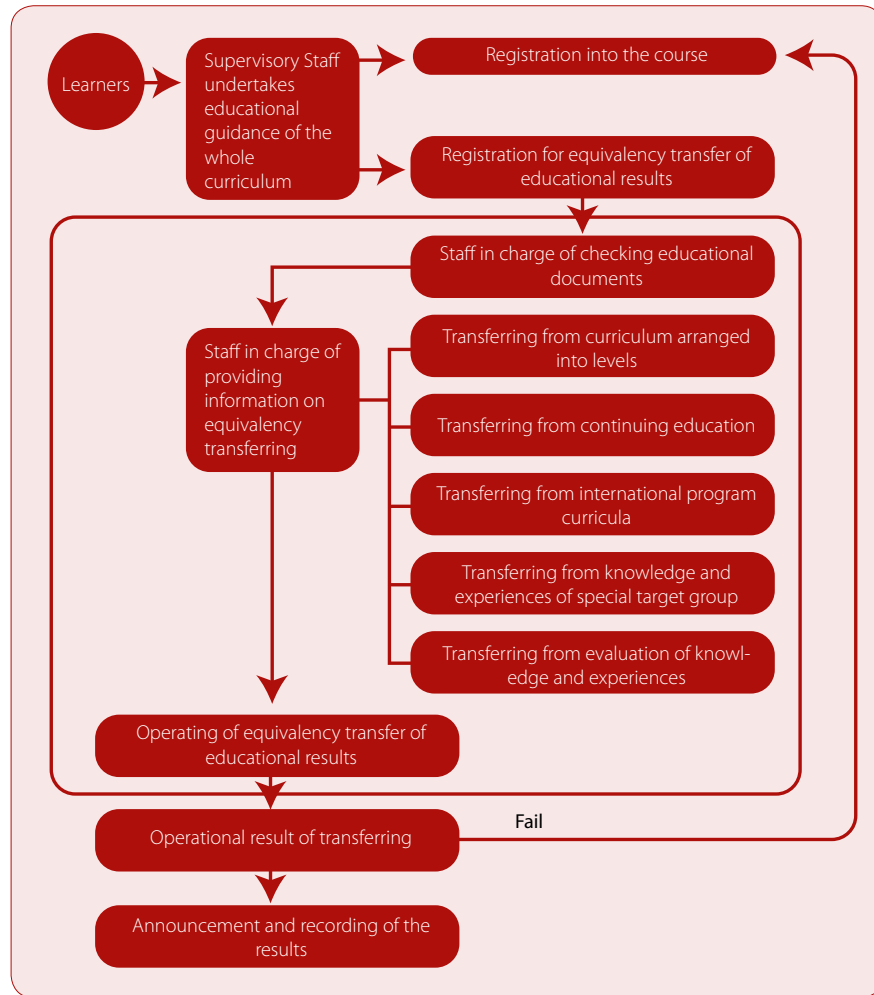
In Asia and the Pacific, the community plays a very important role in supervising CLCs. In Indonesia, the facilitator or FDI (facilitator desa intensif) along with tutors and Directorate Officials all help in the organisation of learning activities. It is important to ensure that local sensitivities are kept in mind when engaging facilitators. Research has also shown that programmes are more sustainable when there is a professional cadre of facilitators. They must be selected by a well-defined process. In some countries, the Village Education Committee selects facilitators.

- Technology-based Learning – The level of technology usage has to be decided at the EP planning stage, taking into account field conditions as well as academic factors. EPs may use technology such as radio, television, computers, videos and telephones, including mobile phones, to reach out to those who are deprived of regular face-to-face teaching. Technology choice also depends on affordability and convenience. In many countries, radio has been successfully used to deliver lessons. Individualised learning through mobile phones is also becoming popular.
- Blended Teaching-learning Approach – In this approach, teaching-learning takes place through a combination of face-to-face interaction and distance learning. In many cases, learners are only part-time students and many are working while others may also have limited time for study. There is a provision for on-campus classes/personal contact programmes through face-to-face sessions along with components of self-study. At face-to-face events facilitators must adopt a dialogue style and establish a rapport with learners. The facilitator must be able to design activities that engage the interest of the learners – these could be practical lessons or group activities that will lead to closer bonding and help learners to

overcome their hesitation. The facilitator may also form small tutorial groups.

- Flexible Learning Approach – Under this approach, learners can design their own learning package. In many countries, EPs have multiple entry and exit points. It is important that both facilitators and learners understand this aspect so that they can take full advantage of the flexibility.
- Recognition of Prior Learning Approach - Another important aspect of EP is the recognition of knowledge and skills that a learner may have obtained through some other system. For example, in the Philippines, learners can seek assessment of their learning needs and can apply for recognition of their prior learning by taking the National NFE A7E Tests. The result determines the grade at which the learner can enter the NFE.

In Thailand, the Office of the Non Formal and Informal Education has launched different types of equivalence transfer. For example, the Equivalence Transfer of Educational Results allows learners to transfer educational results earned and accumulated in either formal school, or non-formal education or informal education, as well as through vocational and work experiences. The flowchart shows how the equivalency transfer of educational results takes place in Thailand:

**Figure 3: Steps in equivalency transfer of educational results**

**Source:** Research Report: Equivalency Transfer of Educational Results, Equivalency Transfer of Knowledge and Experience and Equivalency Determination of Educational Levels in Non-formal Basic Education: A Case Study of Thailand; Sirindhorn Institute for Continuing Education and Development, Office of the Non-Formal and Informal Education, Office of the Permanent Secretary, Ministry of Education; Supported By UNSECO Bangkok 2009.

- Synthesis of Educational Systems Approach – The delivery of EPs is also dependent upon the overall approach of national educational policies. Most countries follow a linear approach, where the learner graduates from one level to the next higher level. Many countries make provision for learners to move horizontally from one system of education to another. Thus, a learner who completes a particular level from an EP can progress to the next higher level in a regular formal school. Similarly, a learner who is a drop-out from a formal school can enroll for a level under the EP.

In India a learner who completes Level A under the Open Basic Education programme can enter Class IV in a formal school. There are also provisions by which a learner can register for a vocational course while pursuing an academic programme in a formal school. Thus, there is both horizontal and vertical transfer that allows learners to move between the different educational systems.

## Implementation Structure

This refers to the conduct of the programme on the ground. In each country, EPs are based upon learner needs and existing available resources. In view of the importance of the implementation structure, decisions regarding the type of structure must be taken at the highest level. The government has to decide how the entire programme will be implemented and delivered as well as agencies that would be involved in the delivery. In most countries with EPs, national, state and district/local governments are actively involved. There is a close partnership between NGOs and community-based organisations in the delivery of programmes.

## Synergies between Organisations

Many actors are involved in the delivery of an EP. The steps to be taken in deciding on the role of different organisations can include examination of:

- state of existing infrastructure and resources available to the government,
- cooperation and understanding between different departments of the government,

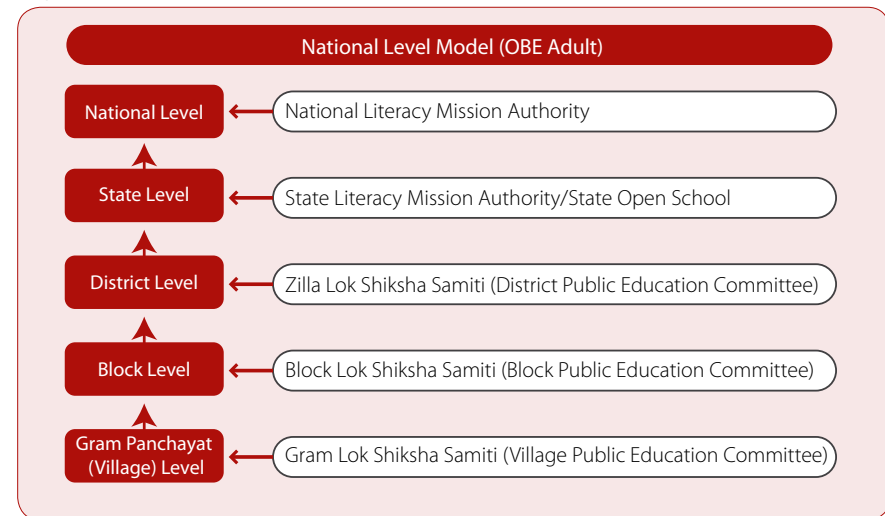
- willingness and resources available in the government to invest in a new structure exclusively for EP,
- willingness of the government to experiment with non-government partners,
- strength of the community and its willingness to take on EP responsibilities, and
- willingness of the government to take on new partners such as religious bodies, corporate bodies, charitable organisations.

In the Philippines, there is close inter-agency networking and partnership between different government agencies and NGOs. The Department of Education has contracted service providers such as colleges, universities, NGOs, civil society organisations, and umbrella organisations with national and regional networks to conduct its EPs. In Thailand, there is no separate organisational structure for EPs. The government uses CLCs created for literacy and continuing education, as well as formal schools, NGO venues, and vocational centres. In India, the Open Basic Education Programme is conducted by the National Institute of Open Schooling (NIOS), which is an autonomous organisation under the Ministry of Human Resource Development, Government of India. NIOS works closely with NGOs and government agencies which are accredited to NIOS for registering learners and conducting the EPs. Most of the NGOs work on EPs for out-of-school children. NIOS also accredits government agencies working in the field of adult literacy and continuing education for the conduct of EPs for neo-literates who have completed literacy levels. Further, NIOS designates state government agencies to conduct state level examinations.

**Hunar, India – Partnership with Madarassas<sup>17</sup>**

Hunar is a unique initiative to reach out to young Muslim girls studying in Madarassas. It aims to provide skill trainings to learners in addition to their religious education. The project is a partnership of three agencies – Bihar Education Project Council (BEPC), the Government of Bihar, National Institute of Open Schooling (NIOS), and the Government of India. The delivery of the programme is through community based organisations that have a strong presence in the state. Although NIOS' policy was formerly to accredit only formal schools as study centre partners, it changed its accreditation criteria to include madarassas/maktabs as study centres. This means it became possible to grant equivalency to the traditional educational institutions of minority communities.

**Figure 4: Implementation structure of EPs, India**



<sup>17</sup> Bist, DS. 2008. *Open and Distance Learning – A Policy Intervention for Inclusive Development & Mainstreaming of Marginalized Socio-Religious Communities – An Indian Case Study. National Institute of Open Schooling, Noida, India.* <http://www.nos.org/odl%20for%20pcf5%20-%20dsbist.pdf> (Viewed 11 November 2011).

In 2009, the National Literacy Mission was recast as Saakshar Bharat (Literate India). It has encouraged states to set up their own State Open Schools and to carry out their own certification.

In the Philippines, the emphasis is on delivery at the grassroots level. The national EP is conducted at non-formal learning centres (NLCs) at the barangay and municipal levels. The centres are run by service providers which include state institutions of higher learning, church-based organisations, umbrella organisations or private service providers who conduct the learning classes on a cost-sharing basis. The selection of these organisations is based upon set criteria.

Service providers engage full-time Instructional Managers (IMs) who are responsible for teaching, non-academic tasks and counselling. IMs may be retired teachers, qualified community development workers, part time teachers or social workers. Municipal and district officials oversee the programme, with responsibilities such as surveying learners in their areas, identifying their needs, mobilising learners, and programme monitoring and evaluation.

The national EPs in Indonesia have a strong community basis with a focus on home schooling. Children receive educational content in their homes and attend Packet examinations. There are a variety of NFE and community centres, and study is also carried out at religious centres. E-learning is used for distance education for children in remote areas. There is also provision for Mobile Education Services in which door-to-door service is provided.



MODULE

# SEVEN

**LEARNING ASSESSMENT  
AND EVALUATION**

Evaluation is vital to ensure that EPs are seen as equal in quality to formal education by government, institutions of higher learning, the market, industry and society at large.

## Learning Assessment

Learning assessment is a process and a tool to obtain learner achievement. Its main purpose is to assess outcomes achieved against stated objectives, and it benefits both learners and teachers. It often begins when facilitators measure learners' outputs in terms of knowledge, attitude and skills after a lesson or series of lessons. They can conduct such assessments through quizzes, tests, exercises, demonstrations, performances, and assignments such as project work or report writing.

There are two types of assessment: formative assessment and summative assessment.

Formative Assessment is the process of giving feedback to the learner. It is carried out during the course of study and the periodicity is decided during curriculum design. Sometimes the assessments can be in the form of weekly tests or monthly tests or even term end examinations. Formative assessment can also take the form of an individual assessment, for instance, self-check exercises within modules. Learners may also be assigned project work, or portfolio development so that their individual capabilities can be easily assessed.

In some countries, facilitators provide a formal test after each lesson. At the end of a semester or term, they provide a final examination. Scores from the continuous and final tests are then amalgamated for the evaluation. In other countries, facilitators provide a formal test after each lesson, a mid-term test and a final exam. The final score is an amalgamation of the results.

Summative Assessment takes place upon the completion of the course of study and performance is evaluated against set criteria. In some countries, a public examination takes place to determine a learners' final grade. Learners are required to pass a national test before progressing to a higher level. The

assessment is usually conducted by an authorised body and a certificate is issued upon successful completion of the examination.

## Learning Evaluation

Evaluation is a broader concept and refers to the worthiness of a performance. It is the process of determining the merit, or value of something or the product of that process. It is a means for obtaining information and using it to form judgments of value, which in turn can be used for decision-making. In the educational system, a teacher evaluates learners with a view to helping them to improve their performance.

Formal Evaluation refers to conventional methods of evaluation carried out under rigid conditions. A typical formal evaluation is a planned and highly structured process, with all aspects of the conduct of the evaluation pre-determined. Timing, mode of conduct, and tools of measurement are planned and known well in advance of being carried out. This mode of evaluation is usually used in formal schooling in the form of standardised tests conducted in the classroom at pre-decided frequencies or through a public examination.

Non-formal Evaluation is more flexible and contextual and can be localised depending upon need. It is more suitable to non-formal education and EPs as it allows for more flexibility in the evaluation process, in evaluation tools, and in frequency of the evaluation.

Informal Evaluation is based upon judgments that are not pre-decided, planned or deliberate. The evaluation is generally based upon observation or reflection or experiences. It is an unstructured form with varying patterns that are based upon the situation and the content to be tested. Informal evaluation is a means to get feedback without causing examination stress and anxiety to learners. Such an evaluation can be used in conjunction with formal evaluations.

## Instruments of Learning Assessment and Evaluation

Learning achievements can be assessed and evaluated either internally or externally.

Internal Evaluation implies that the teacher evaluates the learner. In an internal evaluation, the teacher is familiar with the teaching-learning experiences that the learner has undergone. The teacher also designs the question paper and then evaluates the answers of the learner. An internal evaluation may be a class test, a portfolio assignment, project work, etc.

External Evaluation is an evaluation carried out by a person or agency other than the teacher. This may be in the form of a public examination or an external teacher taking an examination.

Internal and External evaluation may be combined. For example a questionnaire may be set by an external agency and the evaluation carried out internally by a teacher. This combined assessment is carried out as part of Continuous and Comprehensive Evaluation (CCE) in India in formal schooling.

For both forms of evaluations, the following forms of learning assessment and evaluation can be employed.

### Pen and Paper Assessment

The most common system of assessment at all levels is the standardised pen and paper test. Questions may include those requiring short answers, or 'fixed response' types, or essays or 'free response' type.

### Alternative and Authentic Assessment/Performance-based Assessment

This form of assessment is based on the philosophy that evaluation should not limit itself to final outcomes but also to the preceding processes. This facilitates qualitative measurement which is concerned with the learner's performance in a given situation. This type of assessment helps in the formative/constructive part of the teaching-learning process. Thus in alternative assessment, students are evaluated based upon their active performance which could be in the form of oral presentations, open-ended problems, hands-on problems, real-world simulations and other authentic tasks.

A performance-based assessment may be in the form of performances, portfolios, and projects. Performance indicates the demonstration of a skill and the ability to use a particular skill in a given task. This includes a technical skill or an artistic accomplishment. Examples of such skills are designs, drawings, art work, dance, music, sculpture, carpentry, repair-work, photography and others. A portfolio is a collection of documents that allows a learner to narrate the story of her/his work. A portfolio could contain artwork, reports, case studies, photographs, external or peer reviews, letters, observations, etc. A project is another means of showcasing performance. This could involve a detailed study on a particular topic and could include a model, collections and inventions.

The importance of performance-based evaluations lies in the fact that they allow learners an opportunity to reflect upon their work. They can discuss their work with their teachers and peers and explain it – they are therefore, in a dialogue and are active participants in the process of development and evaluation. This type of evaluation allows space for individual expression and cultivation of the learner's mind.

## Examinations

Examination denotes the process of collecting evidence about a learner's growth. It is a technique or data gathering device. It involves planning, construction of tools, conduct administration, scoring of scripts, processing of scores to arrive at a result, etc.

The conduct of examinations for EPs is a result of cooperation between formal and non-formal education systems. In many countries, EPs utilise the infrastructure of the formal school system. This avoids duplication of state resources. There is also commonly a sharing of human resources in relation to ongoing evaluations and minor tests, with many formal school teachers involved in these and with monitoring EP examinations.

An outline example of a formal examination is given from the Philippines:

The Philippines
<p><b>The Alternative Learning Systems Accreditation and Equivalency Test</b></p> <p>The test is divided into two parts: multiple choice tests and composition writing. The test runs for 3 hours and 30 minutes for the Elementary Level, and 4 hours and 15 minutes for the Secondary Level.</p> <p>The test covers the following strands (subject areas):</p> <p><b>ELEMENTARY: 3 hours and 30 minutes</b></p> <p><b>Multiple Choice - 3 hours</b></p> <p>Bahagi I (Communication) - 40 minutes            Bahagi II (Problem Solving &amp; Critical Thinking) - 60 minutes            Bahagi III (Sustainable Use of Resources &amp; Productivity) - 40 minutes            Bahagi IV (Development of Self &amp; Expanding One's World Vision) - 40 minutes            Composition Writing - 30 minutes</p> <p><b>SECONDARY: 4 hours and 15 minutes</b></p> <p><b>Multiple Choice - 3 hours 45 minutes</b></p> <p>Bahagi I (Filipino Communication) - 45 minutes            Bahagi II (English Communication) - 30 minutes            Bahagi III (Problem Solving &amp; Critical Thinking) - 60 minutes            Bahagi IV (Sustainable Use of Resources &amp; Productivity) - 45 minutes            Bahagi V (Development of Self &amp; Expanding One's World Vision) - 45 minutes            Composition Writing - 30 minutes</p>

## Flexible Evaluation Systems

In most countries, the principle of flexibility has been adopted in EP evaluation. Examinations are often held two times a year. In Indonesia, the examinations for Packet A, B, C courses are held in June and November. In India, learners can take examinations depending upon their state of preparedness.

India
<p><b>On Demand Education Scheme (ODES)</b></p> <p>A unique system that highlights the principle of flexibility has been developed in India in which a learner can take an examination as per her/his convenience. This system is called the On Demand Examination Scheme (ODES). Under the regular system of examination, a learner can appear for a public examination in April and October of every year. Under the On Demand system, a learner can register for an examination on a weekly basis. Examinations for different subjects are conducted throughout the year. A learner can make use of this facility by paying the regular examination fee. The results are declared within a month. This innovative scheme is of great help to those who want to secure a certificate at a short notice or those who want to reappear for an examination quickly.</p>

## Criteria for Examinations

Credibility of the certifying agency is very important for the credibility of EPs. In all EPs, it is the government that provides certification. In Indonesia, certification is provided by the National Assessment Centre, Office of Research and Development, Department of National Education. It is interesting to note that the same agency develops question papers for both formal and NFE (Packet) courses. In Thailand, the Office of Non-Formal and Informal Education (ONIE) provides certification. In the Philippines, certification is provided by the Department of Education while in India, NIOS is the recognised national level examination board though there is also certification by some state governments.

Equivalence of the Certificate to Allow Credit Transfers both to Formal Schools and Industry is one of the most important aspects of EPs. It ensures that EP learners possess a qualification of the same merit as that of learners

from the formal system. Only when it is accepted socially and by industry that the two systems are equivalent, the opportunities for graduates of both systems will also be equal. At present, EP learners are not treated equally even though there is parity by law between formal schooling and EPs while in many countries. Countries have to ensure that there is a change not just in legal provisions but also in the mindset of citizens.

Linkages with Industry for Recognition of Certificate are another critical aspect. EPs are offered in vocational education in many countries and are an important route to improving livelihoods. For industry and employment bodies to accept the EP certification, it is vital that curricula are truly equivalent and that there is sufficient hands-on training. Tests should include not just theoretical knowledge but also psycho-motor skills and attitudes.

In the Philippines' Alternative Learning System Accreditation & Equivalency Test, a person who passes either the elementary or secondary level receives a certificate bearing the signature of the Secretary of the Department of Education. This allows a graduate to mainstream into the educational system offered by technical and professional institutes. Learners can also access skills training programmes offered by MFI Foundation and the Technical Education and Skills Development Authority (TESDA) and acquire eligibility for government employment positions.

### **Conduct of Examinations**

The conduct of examinations is one of the most challenging aspects of EPs and requires high-level planning and monitoring. The successful conduct of examinations is very important so that the credibility of the certification is maintained. The process of the conduct of examinations differs from country to country. In Indonesia, there is a pre-decided date nationwide to conduct an examination. The number of agencies involved in examinations depends upon the existing implementation structure. However, in all countries, it is accepted that integrity, reliability and credibility of the test is most important. Security measures are taken during the conduct of the

exam as well as beforehand regarding issues of confidentiality of question papers and afterwards in relation to security of the purchase of paper and ink for certificate printing, use of special hologram on certificates, etc.

In India, examinations for OBE are conducted by Accredited Agencies (AAs). Some features of the examinations are as follows:

- AAs must inform NIOS about the date of examination and number of registered examinees at least one month before the scheduled date of examination,
- Question papers are based on a design and blueprint approved by NIOS,
- The medium of examination may be regional languages/Hindi/English,
- The state level agency designated by the NIOS as the state-coordinating agency is also the monitoring agency for the OBE examination in their respective state,
- Academic facilitators and staff of NIOS may visit AAs during examination,
- 5% of answer books, question papers, and attendance sheets are procured from the AAs for random checking and evaluation,
- NIOS compares results data with enrolment data along with verification and editing of the results data before certification,
- State level agency appoints evaluators for checking papers,
- Results are prepared and signed by the authorised signatory before sending to NIOS for printing of certificates,
- Answer books are preserved by the AAs to make them available, if need be, for inspection by the authorised personnel of NIOS,
- Agency sends the result in CD in the prescribed format for printing of certificates,
- Jointly signed certificates are issued by the concerned agency and NIOS, and
- AAs distribute the OBE certificates free of cost to the students.

### *Completion and Certification*

After learners finish and pass a course/programme they obtain a certificate which is equivalent to formal education. In general, a dedicated government institution sets the criteria for completion and certification at national level, while local institutions may add local elements. Some countries organise graduation ceremonies to promote public recognition of EPs.

MODULE

# EIGHT

**RESOURCE MOBILISATION AND  
FINANCIAL MANAGEMENT**

The successful implementation of a programme depends upon the allocated resources. Policy makers must ensure that there is no resource gaps in the conduct of a programme and that resources are maximised for greatest efficiency.

## Types of Resources

Resources are of different types, including human resources, materials, infrastructure and financial resources. One of the most important resources is human resources. These include all those who undertake project activities, including teachers, facilitators, volunteers, assistants, auxiliary staff, CLC staff, management committees and others.

Materials are also a vital resource. It is essential that EP materials are of an equivalent standard to those in formal schooling. Learners must be provided with high quality resources such as books, readers, work books, library books, and project work materials. Audio and video materials can also enrich learning.

Infrastructure of an EP includes buildings, rooms, furniture, and other physical aspects necessary for implementation. It must also be of a similar standard to those of formal school goers.

Financial resources are of course the backbone of any programme, both at the initiation and throughout the implementation stages. Without adequate finances, it is difficult to initiate a programme and a lack of finances for its implementation affects continuity and quality of the programme.

Intangible resources also contribute to the success of a programme. These include the time contributed by persons associated with the programme who are not necessarily employed as wage earners. In many countries, volunteers such as unemployed youth, retired persons and community persons willingly perform duties for the success of the programme. This is a valuable resource that helps to keep the programme healthy and close in spirit to the community.

## Mobilising Resources

The conduct of EPs may require the generation of additional resources. This can be achieved through undertaking collaborative and innovative activities that can lead to new projects and bring about funding from donors. Resource generation could start with the creation of a possible list of donors. These could include trusts, charitable organisations, religious organisations, individuals and private sector companies.

The process should begin with a concrete proposal and plan of action. A proposal should state the development goal, objectives, activities to be carried out, target groups for which the activity is being undertaken, methodology for the activity, materials required, outcomes, and funds required for the completion of the activity. It is important that the person or organisation being approached for funding should be able to clearly see the utility of the project from their own perspective and so that they become willing partners. The element of sincerity and honesty needs to be stressed. Transparency in the use of funds will raise the credibility of the project.

In addition, EP activities and/or fundraising events could take place around celebrations such as National Day or on International Days such as "Literacy Day".

Resources can be generated:

- To increase financial support of national budget,
- To improve financial support of province and district, and village,
- To raise the level of social participation in EP financing,
- To increase the financial support from the private sector,
- To design programmes for individuals charging tuition fee from learners.

## Managing Resources

Management of resources means the efficient and effective deployment of resources for the achievement of set objectives. This requires planning and knowledge about which material and human resources are needed,



how much money is required and what time is available for carrying out activities. The resources have to be organised, directed and used judiciously to ensure there is no wastage.

In EPs there is often a considerable sharing of resources with other systems of education. In India, formal school buildings are utilised. Therefore, programmes must be planned to ensure there are no clashes in class timings and that both sectors can use the same resource effectively.

Resource levelling is also important for EPs. This is a technique which aims to find underused people or resources within an organisation and to place them at a place/task where they could be used more effectively.

## Financial Management

Basic EP funds are usually allocated for:

- Providing teaching materials and tools, writing modules and providing for stationery including development and printing of materials,
- Providing materials for practice and tools for skills education,
- Paying the honorariums/fees of tutors, administrators and implementers,
- Training for tutors and administrators,
- Evaluation and testing,
- Giving scholarships to exceptional students,
- Financial aid for poor learners,
- Vocational practice for life skills,
- Maintenance of facilities,
- Data management.

EPs are run by government, but most programmes have a strong community basis and the implementation of the programmes is closely observed by the community.

Finances need careful management. In most countries, budgets are allocated by the government and may be small compared to budgets for

formal schooling. Thus EP managers have to make decisions with great care. Financial management involves planning income and expenditure related to the activities of the programme and making decisions that will enable the programme to be sustainable and thus fulfill its goals. This includes financial planning and budgeting, financial accounting, financial analysis and financial decision-making.

Accountability is an important aspect of financial management. Programmes must be able to demonstrate that funds are spent appropriately and that all transactions are transparent and legal.

Financial analysis should be carried out on a continuous basis at village, district, state and national levels. Information should flow from one level to another. This makes it possible to form a monitoring cycle to check whether the programme is on track and whether funds are being used judiciously.

Sectors with responsibility for improvement and development of financial resources can include:

- Directorate General/EP Directorate
- Regional centre of NFE
- Provincial centre of NFE
- District centre of NFE
- Block level
- Village level

Financial analysis is a pre-requisite to financial decision-making. Analysis reveals whether there has been under-spending or over-spending, leading to corrective measures or new decisions.

Many EPs in the Asia-Pacific region are conducted with funds from the national budget and supplemented with funds from state budgets. After decentralisation legislation was passed in Indonesia, EP budgets were shared by central and provincial governments. Decisions about the use of funds rest with the state government. Significant parts of the education fund also come from the community, especially parents and students.

In India, funding for adult EPs is provided by the government. There is no fee charged for any programme at the pre-secondary level and there is no provision for donations from parents. However, the contribution of the community is seen in the form of village buildings being made available such as religious halls and local government offices.

MODULE

# NINE

**COMMUNITY PARTICIPATION,  
NETWORKING AND  
PARTNERSHIP BUILDING**

The success of EPs at the grass-root level depends upon the participation of communities and on whether communities feel a sense of ownership in the programme.

## Community Participation and its Importance

Community participation allows local people to be involved in decisions that affect their lives. These decisions could relate to education, health, environment, livelihoods or other aspects of life. Community participation ensures that social and economic interventions are based upon the real needs of the community and its development challenges. The community can encourage the active participation of various agencies and the full participation of villagers. The community can also formulate the outcomes of a programme and monitor and evaluate.

The community has a vital role to play in implementing EPs. EPs generally need social advocacy so that children, out-of-school youth, people with disabilities, adults and all those who want to continue their education can avail of the programmes. In many cases, girls and women make up the majority of EP learners. Where social and religious restrictions make it difficult for women to join continuing education programmes, social motivation and advocacy by the community can help to bring girls and women into EP programmes more easily.

Community participation also contributes to creating a bridge between individual parents who may lack skills, knowledge and resources to interact effectively with teachers and facilitators. Community coordination councils, parents associations, and mothers clubs are all potential important supporters of education for out-of-school youths. Through cooperative organising, parents can become effective advocates for improved standards and provisions. They can work to support EPs, monitor learning progress and hold achievements to account.

Finally, community participation recognises that local people are able to provide insights and knowledge that are not available to external decision makers.

## Types of Community Participation

Community participation can be of different types, as follows:

- a) Passive Participation – People participate by waiting and watching what is going to happen or has already happened.
- b) Participation in Information Giving – People participate by answering questions posed by researchers using questionnaire surveys or similar approaches. However, such participation can be useful only if the community is later provided an opportunity to reflect upon the findings of the research.
- c) Participation by Consultation – People participate by being consulted, and external people listen to their views. These external professionals define both the problems and solutions and may modify them in the light of people's response.
- d) Participation for Material Incentives – People participate by providing resources, for example, labor in return for food, cash or other material incentives.
- e) Functional Participation – People participate by forming groups to meet predetermined objectives related to the project that can involve the development or promotion of externally initiated social organisation.
- f) Interactive Participation – People participate in joint analysis, which leads to action plans and the formation of new local institutions or the strengthening of new ones. Different methodologies are often used to elicit multiple perspectives and make use of systematic and structured learning processes.
- g) Self-mobilisation – People participate by taking initiatives independent of external institutions to change systems. They develop contacts with external institutions for resources and technical advice they need, but retain control over how resources are used.

Community participation recognises that local people are able to provide insights and knowledge that are not available to external decision makers.

## Enabling and Disabling Factors for Community Participation

There are a number of factors that can enable active community participation. Main enabling factors are:

- Openness and cordial relations among sectors,
- Positive cultural environment,
- Establishment of appropriate structures, and
- Acceptance by NGOs of the need to deal with government.

On the other hand, communities could be demotivated through the following factors:

- Mutual suspicion and mistrust,
- Traditional politics,
- Rivalry between sectors, and
- Non-institutionalisation of programmes and projects.

## Community Participation and EPs

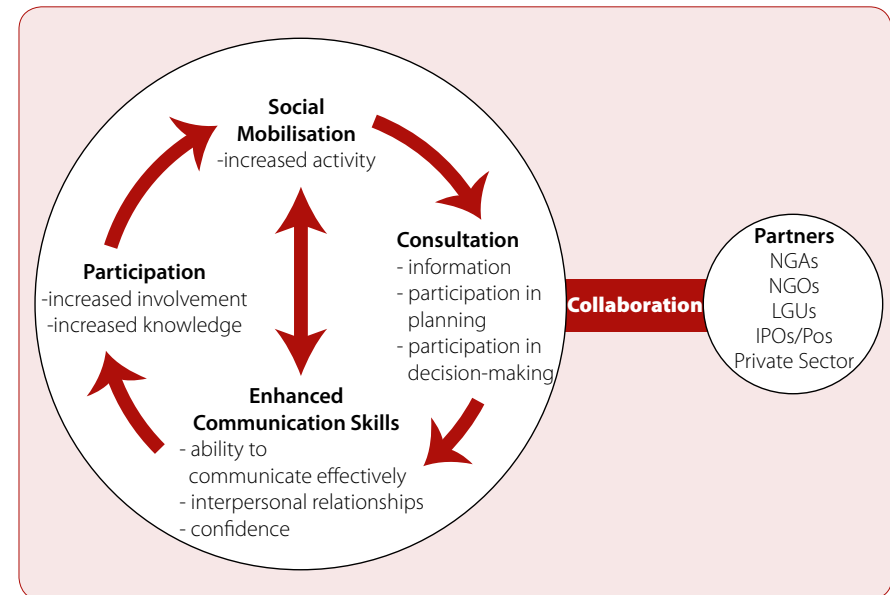
EPs are sometimes implemented through the Community Learning Centres (CLCs) which are focal points for activities such as:

- Providing EP, Vocational Skills Training, Early Childhood Education, Functional Literacy Programmes,
- Providing a space or place for community activities like rural festivals, awareness and health promotion programmes, and
- Providing consultants to solve community problems. CLC activists and volunteers can help the community in community problems by giving understanding, training and consultation.

Community contributions in the operation of CLC activities relating to EPs can include:

- Providing support for development of local learning materials in the form of printed, audio and visual materials,
- Identifying and providing facilitators/tutors as volunteers,
- Being involved in monitoring and supervision,
- Recommending local representatives to be a part of the CLC committee, and
- Facilitating CLC with locations, funds/grants to support CLC operational activities.

Figure 5: Social mobilisation/consultation/participation/collaboration



EPs rely on a healthy working relationship between the government and the community. This is achieved when community members are in regular contact with government representatives and are constantly involved in decision-making related to their village. For EPs, such involvement includes decision-making on identification of courses, implementation and monitoring.

It is vital for government to understand that the success of an EP lies in making use of local insights and the willingness of the community to run the programme. The sharing of responsibilities between government and community makes for a sustainable programme. Community can be encouraged to become an equal partner of the programme and both parties share responsibilities to obtain better outcomes.

## Achieving Community Support

Community support for EPs can be achieved through the following approaches:

- Proper advocacy and social mobilisation before the start of the programme,
- Selfless motivation, strong convincing power and patience,
- Ability to accept suggestions. Recognition of the efforts of persons whose efforts increase community participation,
- Identification and presentation of concrete examples that have been successful, and
- Transparency of budgetary requirements and financial accountability.

## Networking and Partnership Building

Networking means developing linkages amongst stakeholders: the community, government line agencies, non-government organisations, local government units, donor agencies and others. Networking facilitates interaction between experts in different areas and promotes the sharing of ideas and information and resources. In many countries the EP model is based upon networking and partnerships to ensure the effective sharing of resources and reduction of infrastructural costs.

Networking begins with identifying the relevant people, organisations and agencies for collaboration. It is important to be familiar with the programmes and activities of other organisations and agencies working on related issues in communities. In India, the OBE programme is run with the help of NGOs working in basic education. The NGOs have their own infrastructure and teachers and have a close rapport with the local community. Learners are taught by local teachers but are certified through a joint mechanism of the NGO and the National Institute of Open Schooling. In Indonesia, the Equivalency Education Programme tries to leverage the capability of different communities to provide education services to underserved populations. Communities are empowered to carry out community-based non-formal education services, while the government plays the role of facilitator.

Key points to strengthen any networks and partnerships include:

- Take note of the goals and objectives of the possible partner agencies and relate them with the goals and objectives of the communities,
- Clarify the roles and functions of each agency/person involved,
- Set a common purpose/goal that all the agencies/persons can understand and relate to,
- Maintain the network through regular formal/non-formal communication and meetings, and
- Be ready to participate in the agencies' other activities. It is not enough that you involve them in your own projects/activities. You should also be willing and available to participate in their activities when needed.

## Networking Tips for the Field Worker

If a CLC is the venue for EP activities, volunteers and field workers must interact with not just learners but also NGO representatives, partner organisations, members of various committees, etc. Some actions for successful introductions and networking are as below:

- Prepare the necessary documents as well as yourself for presentation to stakeholders,

- Always consider that stakeholders are your co-partners, so it is also important to show courtesy and respect,
- You might be a simple individual but you mean a lot to the stakeholders,
- Accept other people's opinions and ideas with an open heart and mind, and speak briefly but clearly,
- Always be attentive to issues and concerns, and
- Always record all agreements made.

### Areas of Networking and Partnership Building

EP flexibility means the potential to offer a range of courses for diverse populations. A strong EP can be built at the local level through consultations with partners and by making use of available expertise in the area. Partnerships can be fostered through:

- Development of courses, especially skills development courses based on local needs, possibly involving local industry for apprenticeship programmes,
- Engaging of faculty for special programmes – experts from industry, education, other sectors can be invited for interaction with learners,
- Training programmes,
- Infrastructure sharing – community halls, playgrounds can be shared,
- Monitoring – village elders, community leaders can be involved in overseeing the programme,
- Examination and Certification – government agencies can be approached for certification of the courses,
- Sponsorships and Awards – learner motivation can be kept high through competitions and games which can be judged and awarded by sponsors,
- Advocacy – local media can be kept updated about developments, and
- Research – Feedback studies can be commissioned to external agencies so that there is independent review of the programme.

#### Mongolia

In the Uburhangai *aimag* (province) of Mongolia, the central CLC has set up satellite CLCs in order to deliver programmes more effectively. All CLCs are directly supported by local government. The main role of the central CLC is to coordinate and network the activities of the satellite CLCs to fully utilise local resources through agriculture and tourism. A variety of community programmes for out of school children and women have been developed. The satellites have shared resources, expertise and research.

MODULE  
**TEN**

**MONITORING AND EVALUATION**



Monitoring and evaluation is vital to ensure that EP goals and objectives are being met. EPs comprise many different components, including organisational structure, delivery systems, curriculum planning, materials development, examination and certification. Other aspects include the role of the government and community leaders, budget allocations, human resources, and infrastructure. Monitoring and evaluation provides data and information that helps to determine the achievement level of all these aspects, and to identify any problems or obstacles. Every country must design its own monitoring and evaluation systems based upon the goals of its EP.

## Monitoring and Evaluation in the Context of EPs

Monitoring is the process of systematic observing, collecting, processing and analysing data, and examining the condition of a programme from beginning to end. The monitoring of EPs involves:

- Collecting data and information about different aspects of the EP to identify problems in the design and implementation of the programme, and
- Making suggestions for improvement and successful completion of the programme.

Evaluation is the measurement of impact of an activity against its goals and objectives with a view to determining whether and how these have been achieved. The evaluation of EPs involves:

- Measuring the level of achievement in implementation against the EP goals,
- Measuring learners' competence levels with respect to achieving equivalent education,
- Giving technical guidance, supervision, and administration to institutions conducting EPs,

- Providing feedback to the government in order to achieve the targets as set in the programme,
- Measuring the benefit of instruments, infrastructure, equipment, learning materials and human resources involved in the conduct of EPs, and
- Studying the financial aspects and their impact upon the programme.

Effective monitoring and evaluation requires first putting in place a strong **Management Information System (MIS)** with the following purposes:

- To collect, store, analyse and disseminate information,
- To provide educational planners with a base for decision-making,
- To integrate databases into a system,
- To provide feedback to teachers, facilitators and teacher educators at different levels,
- To set norms for performance and achievement indicators, and
- To set criteria for success and failure.

## Target Groups

In order to ensure that EPs are successful, it is necessary to obtain reports from different stakeholders including local people, grass-root organisations, project team, partners and others. Each group has a specific role to perform, and the overall performance of the EP depends on the quality of each, and their relationships. The key stakeholders are:

- Government agency responsible for EP policy making, implementation and funding,
- Department/Bureau/Directorate that supervises the EP,
- Officials in study centres that conduct the EP,
- Tutor/Facilitator/Instructional Manager/Supervisor at the study centre.
- Learners, and
- Local community.

Cooperation and collaboration between each group of stakeholders is the key to success of a programme.

## Scope

The scope of monitoring and evaluation for EPs is:

- To design the monitoring and evaluation mechanism,
- To develop a monitoring and evaluation guide,
- To monitor different aspects of the EPs and conduct evaluations at regular intervals,
- To construct the instruments of monitoring and evaluation,
- To state the place and the time for monitoring and evaluation,
- To arrange the schedule of monitoring and evaluation,
- To analyse the results of the monitoring and evaluation, and
- To report the impact of the monitoring and evaluation.

## Models

There are various models for monitoring and evaluation that may be deployed as appropriate:

- Objective Oriented: Examines the extent to which objectives have been achieved focusing on specified goals and objectives,
- Management Oriented: Focuses on identifying and meeting the needs of decision makers,
- Process Oriented: Aims at improving the classroom process, teaching-learning process, use of teaching-learning materials, classroom management, etc.,
- Expertise Oriented: Focuses upon the professional development of teachers and facilitators, and
- Participant Oriented: Focuses on the involvement/participation of target groups.

## Methods

Monitoring is a regular and continuous process. A baseline should be established at the beginning. Updated data can be compared to the baseline so that comparisons can be made. Monitoring methods may include:

- Sampling method,
- Discussion method,
- Spatially distributed information,
- Time-based pattern of change,
- Analysing linkages and relationships, and
- Ranking and prioritising.

Each method has its own purpose, steps and strategies application strategies. Sometimes two or more methods may be integrated, according to needs.

Here is a sample series of steps for monitoring and evaluation of an EP in a district:

1. Form a team for monitoring and evaluation,
2. Create a mandate letter for monitoring and evaluation,
3. Create a mission letter,
4. Check and contact the target district,
5. Prepare the instruments,
6. Report to the education office about the target district before starting the exercise,
7. Meet with the EP stakeholders, facilitated by the district education office,
8. Conduct a field trip and hold discussions with groups of learners,
9. Collect the data about academic and non-academic aspects of the EP,
10. Analyse the result of monitoring and evaluation activities, and
11. Write a report on the implementation of the monitoring and evaluation activity.

## Indicators of an EP Monitoring System

The indicators for monitoring an EP could include:

- Basic infrastructure and other facilities,
- Management and community support,
- Classroom environment,
- Curriculum and teaching-learning materials,
- Facilitator preparation,
- Classroom practices and process,
- Opportunity time (teaching-learning time),
- Learners assessment, monitoring and supervision,
- Involvement of government and non-government partners, and
- Budgets that come from national budget, local budget or self-supported.

Followings are examples of indicators for monitoring and evaluation of EPs.

**Figure 6: Examples of indicators**

### Basic Infrastructure and Other Facilities

- Space/classroom for learning
- Space for performing activities
- Drinking water facilities
- Toilet facility
- Play ground/space for games
- Space for skill development workshops
- Availability of supplementary materials
- Library and its use
- Laboratories, if there is any, for science and laboratory-based courses

### Management and Community Support

- Attendance of learners and facilitator
- Facility for tutorials/guidance
- Financial support
- Development of teaching-learning materials
- Availability of books and other study materials

### CLC Classroom Environment

- Physical environment
- Social environment
  - Learner-learner relationship
  - Facilitator-learner relationship
  - Facilitator-facilitator relationship
  - Facilitator-administrator relationship
  - Facilitator-parent relationship
  - Facilitator-community relationship
  - Treatment of learners from marginalised groups
  - Participation of community in CLC activities
  - Facilities for convergence with other departments such as health, agriculture
  - Incentive schemes

### **Curriculum and Teaching-learning Materials**

- Curriculum and its coverage
- Curriculum revision exercise
- Number of academic and skill development programmes offered
- Competency-based materials
- Blackboard/ICT usage in class
- Textbooks and their production
- Distribution of textbooks/course materials
- Availability of teaching-learning materials

### **Facilitator Preparation**

- Facilitator profile
- Facilitator position (class-wise)
- Class teacher/subject teacher
- Pre-service experience
- In-service experience
- Difficulties faced during teaching
- Ability to develop and use teaching-learning materials
- Motivation level of facilitator
- Role of state bodies in training/re-training of facilitators
- Monitoring classroom processes

### **Classroom Practice and Process**

- Classroom organisation
- Display of materials in the classroom
- Facilities for keeping teaching-learning materials
- Grouping of learners
- Pupil-facilitator ratio
- Methods of introducing the topic
- Teaching-learning process
- Use of teaching-learning materials
- Learner initiatives in teaching-learning process
- Assessment processes
- Frequency of assessment

### **Opportunity Time (Teaching-learning Time)**

- Number of days CLC is opened in a year
- Actual number of days teaching-learning occurs
- Number of teaching hours/days
- Number of facilitators in CLC
- Number of classes that each facilitator handles
- Learners' attendance

### **Learner Assessment, Monitoring and Supervision**

- Policy for
  - Grades/marks
  - Internal/external examination
  - Periodicity of assessment
  - Reward and incentives
  - Recording procedures in schools
- Feedback mechanism used by facilitators
- Timely remedial and corrective measures
- Involvement of parents in Village Education Development Committee meeting
- Procedure to give feedback to parents

### **Equivalence and Synergy with Formal Schooling**

- Recognition by national government and legal validity of EP Certificate
- Provision of transfer from formal education to EP and vice versa
- Number of learners transferring between the two systems
- Linkages of EP databases to national education databases
- Recognition of EP learners by industry
- Number of learners who have been able to secure employment

## Sample Monitoring and Evaluation Activity Report

An example structure for of a monitoring and evaluation report is as follows:

### Section I: Introduction

#### A. Background

Describe the importance of monitoring and evaluating of the EP

#### B. Objectives

The objective to be achieved from the implementation of the EP

#### C. Targets

The organiser of the programme and the stakeholders

### Section II: The Results of Activity

#### A. Data Description

1. Condition and support of EP components
2. The availability and readiness of input components
3. The process of the implementation of the programme
4. The achievement of the target/result
5. Support from the government and community
6. Problems in EPs

#### B. Improvements before and after the implementation of the EP

#### C. Funding responsibility

### Section III: Closing

#### A. Conclusions (from data analysis)

#### B. Suggestions

#### C. Recommendations

#### Note:

Interviews, document analysis and observations are compiled and analysed to make conclusions about the competence and achievements of the programme. This is then used to recommend improvements and enhancements to the programme.

## Sample Monitoring and Evaluation Form

Source: Department of Education, non-formal education sub-department (Region/Province/City)

### Part I: General Information

Name and Position of the Resource Person:.....

#### *Description of EPs in Region (Region/Province/City)*

1. How many primary and high school age people who do not go to school are there in the region/province/city?
2. How many illiterate people aged 7-17 and 18-35 are there?
3. What is the composition of the community?
4. How do you get the data for number 1, 2, 3?

**Target**

1. Explain the Target of EP.

Organiser	Location	Target number
a.		
b.		
c.		

**Budget**

1. How much of the EP budget is from the *national budget*? How many targets to achieve?
2. How much of the budget is from a *local budget*? How many targets are there to achieve?

**Human Resources**

1. How many facilitators are active?
2. How many facilitators are funded by the national budget and by the *local budget*?
3. How much is the payment for facilitators, NFE field workers, EP facilitators?
4. What is the payment system?
5. How much is allocation from the national budget and local budget to pay EP facilitators/tutors?

**Learning Materials**

1. What learning materials are used?
2. What is the availability of learning materials (number and quality)?

**Part II: Institution implementing EPs**

Name and Position of Resource Person: .....

**Target**

1. What is the size of the target audience per year?
2. Where do the learners live?

**Budget**

1. What is the budget given by national and/or local government?
2. How much is the budget of the institution and others?

**Human Resources**

1. How many EP facilitators/tutors are employed by the institution?
2. What are the facilitators/tutors' educational backgrounds?
3. How much is a facilitators/tutors' salary?

**Instrument and Infrastructure**

1. What learning materials are given in EPs?
2. What is the condition of the learning place, and what equipment is there?

**Part III: The Tutor**

Name and Position of Resource Person: .....

**Target**

1. How many learners are taught?
2. Where do learners live?
3. How would you describe learners?

**Teaching Learning Process**

1. Where is the learning activity carried out?
2. How long is the learning duration?
3. What learning materials are used?
4. What learning method is used?
5. How is evaluation carried out?

6. Explain any obstacles.
7. Explain the learning advantage of the EP.

**Others**

1. How much is your salary?
2. What is the salary/payment system?
3. What other work do you do as well as working on the EP?

**Part IV: The Learner**

Name and Position of Resource Person: .....

**Recruitment**

1. How old are you?
2. What is your occupation?
3. Where do you live?
4. What is your marital status?
5. What is your former education?
6. Since when did you take part in the EP?
7. Did anyone ask you to join the EP, and if so, who?

**Teaching-learning Process**

1. Where is the learning activity carried out?
2. How long is the learning duration?
3. What learning materials are used?
4. What learning method is applied?
5. What learning materials (i.e. books) have you received during learning?
6. Do you like EP activities?
7. Which lessons do you like best?



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