A quick introduction and guide for busy policymakers and practitioners grappling with how to understand and assess the ICT-related investments underway in the education sector.

This short handbook provides guidance for policymakers struggling with two key issues:
1. What is the impact on student achievement of introducing ICT in educational settings in developing countries?
2. How should this impact be measured, and what are the related issues, especially as they relate to Education For All and other Millennium Development Goals?

Topics:
- Monitoring and Evaluation of ICT4E: Overview
- Review of Monitoring and Evaluation Impact Evidence
- Core Indicators for Monitoring and Evaluation Studies
- Developing a Monitoring and Evaluation Plan
- Capacity Building and Management
- Pro-Equity Approaches to Monitoring and Evaluation: Gender, Marginalized Groups and Special Needs Populations
- Dos and Don’ts in Monitoring and Evaluation
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6. Dos and Don'ts in Monitoring and Evaluation

Tim Unwin and Bob Day

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The authors would like to thank Mike Trucano and his colleagues at infoDev and the World Bank for their generous time and support in bringing this project to fruition under very tight time constraints. Additionally, the authors would like to thank Bob Kozma for his inputs into the section on conceptual framework in the Overview; Siew Lian Wee and Ernesto Laval for their valuable suggestions in Chapter 3. We would also like to thank a number of advisors to the volume, including: Andrea Antossi; Boubakar Barry; Mohammed Bougroum; Estique Hinostroza; Shafika Isaacs; Daniel Kakinda; Meng Hongwei; Edys Quellmalz; Pornpun Waitayangkoon. Dan Wagner of the International Literacy Institute (University of Pennsylvania) served as managing editor of the volume, while Penn students, Kim Hoover and Li Zehua, provided excellent assistance in researching materials for the Annex. The Spencer Foundation helped to provide important background resources for this volume; UNESCO hosted a working meeting in Paris for the Handbook writing team, advisors and other experts in the context of its Conference on ICT for Capacity Building (Paris, May 2005); the Office of Vocational and Adult Education (OVAE) and the U.S. Department of Education through a grant under TECH21 (the National Technology Laboratory for Literacy and Adult Education) at ILI/Penn provided institutional support; and LEARN International provided administrative support for the Handbook writing team. Naturally, all perspectives and points of views represented in this volume are those of the authors alone, and do not necessarily represent the policies or views of any agency.
### ABBREVIATIONS

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<td>GNP</td>
<td>Gross national product</td>
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<td>HDI</td>
<td>Human development index</td>
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<td>ICT</td>
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<td>ICT4D</td>
<td>Information and communication technologies for development</td>
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<td>ICT4E</td>
<td>Information and communication technologies for education</td>
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<td>IFC</td>
<td>International Finance Corporation</td>
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<td>infoDev</td>
<td>Information for Development Program</td>
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<td>IT</td>
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<td>ITU</td>
<td>International Telecommunications Union</td>
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<td>LDC</td>
<td>Less developed countries</td>
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<td>MDGs</td>
<td>Millennium Development Goals</td>
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<td>NGO</td>
<td>Non-government organization</td>
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<td>OECD</td>
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EXECUTIVE SUMMARY

While it would be difficult to deny the value—even the necessity—of bringing technology into schools, evidence from the past decade provides strong evidence that misguided policies and funding for internet communication technology (ICT) in education may fail to have the desired education outcomes, while costing more than other education interventions.

The United Nations Millennium Development Goals, and in fact the national development plans of most countries, include prominent targets for improving education. It therefore essential that policy makers and development practitioners ensure that investments in ICT for Education (ICT4E) are, in fact, contributing to these greater educational goals.

Because local strategies—rather than a universal approach—are typically most effective—this Handbook has been designed to help policymakers and practitioners assess ICT4E programs already underway in their countries and to integrate monitoring and evaluation components into future programs. It provides them with tools to develop more effective future strategies, which coordinate the introduction of computers with national education policies and programs related to changes in curriculum, teaching methods, assessment and teacher training. With this combined approach, the authors of the handbook conclude, countries will be most likely to achieve better educational outcomes, the true end-goal of introducing ICT into education programs.

OVERVIEW

The overview provides the context for investment in ICT4E, which should ultimately contribute to the education targets identified in the Millennium Development Goals. It identifies the need for a more credible knowledge base to help policy makers more effectively choose from among ICT4E options, and it points to the need for a conceptual framework for ICT4E which takes into account not only a variety of broad development concerns, but also the many context-sensitive issues related to ICT4E.

THE CHAPTERS

1. Monitoring and Evaluation of ICT for Education Impact: A Review
   R. B. Kozma

Research suggests that simply putting computers into schools is not enough to impact student learning. That said, specific applications of ICT can positively impact student knowledge, skills and attitudes, as well as teaching practices, school innovation, and community services. In this chapter, three main issues are considered in terms of the impact of ICTs in education: (a) student outcomes such as higher scores in school subjects or the learning of entirely new skills needed for a developing economy; (b) teacher and classroom outcomes such as development of teachers’ technology skills and knowledge of new pedagogical approaches, as well as improved attitudes toward teaching; and (c) other outcomes such as increased innovativeness in schools and increased access of community members to adult education and literacy.

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Monitoring and Evaluation of ICT in Education Projects

A critical analysis is provided of leading comparative international studies as well as select projects utilizing ICTs to benefit education in LDCs. Evidence from these suggest that policymakers and project leaders should think in terms of combinations of input factors that can work together to influence impact. Coordinating the introduction of computers with national policies and programs related to changes in curriculum, pedagogy, assessment, and teacher training is more likely to result in greater learning and other outcomes.

2. Core Indicators for Monitoring and Evaluation Studies for ICT for Education

R. B. Kozma and D. A. Wagner

Core indicators measure the inputs and outcomes of a program or project and are essential in the evaluation of ICT4E initiatives. This chapter identifies useful core indicators, which should relate to specific components of the ICT intervention and their implementation, and include both input variables (such as classroom ICT resources, teacher training, and classroom pedagogy), as well as output variables (such as student learning of school subject, learning of ICT skills, and “21st century” skills, affective outcomes, and so on).

Also considered are cost-benefit analyses—that is, how to determine the value of the costs and benefits of a particular project, both in fiscal and non-fiscal aspects. In sum, a framework is required in order to determine a core set of indicators of relevance for policy and practice, with a focus on what these indicators may or may not show concerning impact and effectiveness.

3. Developing a Monitoring and Evaluation Plan for ICT for Education

T. James and J. Miller

Monitoring and evaluation should be an integral component of any planned ICT4E program and should be factored into planning before a project starts. This chapter provides an overview of the processes, tasks and outcomes that are needed to implement a successful M&E plan. It suggests appropriate, realistic and measurable indicators which should be used to monitor outputs and outcomes, and advises that major stakeholders should be identified and involved in making M&E decisions to avoid possible problems with “buy-in” and commitment later in the process.

Finally, the chapter discusses budgeting for M&E activities, suggesting that approximately 5 to 10 percent of total project costs be set aside as a reasonable target for M&E programming.

4. Capacity Building and Management in ICT for Education

T. Unwin

The committed involvement of professionals is required for any systemic change, large or small. One major limitation for change in ICT and education is that the large majority of the instructional staff in the education systems (formal and non-formal) in LDCs remains with little or no ICT literacy. Furthermore, there have been only limited resources and strategies for involving full-time ICT professionals in school-based settings.

This chapter outlines how capacity building—in the form of increasing the proportion of well-trained ICT-literacy teachers and/or full-time ICT instructors—is at the heart of the renewal of effective and high quality work in ICT and education. It goes further to suggest that, not only teachers and administrators, but all key participants involved in the ICT4E initiative receive adequate training including, in particular, those charged with monitoring and evaluation.

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5. Pro-Equity Approaches to Monitoring and Evaluation: Gender, Marginalized Groups and Special Needs Populations

D. Wagner

It is widely understood that population characteristics and social-economic issues have a direct bearing on the effectiveness of any educational intervention. The goals of Education for All and the MDGs are very clear about the need to promote pro-equity approaches to gender (women and girls), among “marginalized” populations (such as illiterate persons, ethno-linguistic minorities, refugees, and so forth), and those with special educational need.

This chapter discusses and identifies equity-sensitive M&E indicators which could work towards promoting greater inclusion of populations within the MDGs. These include the demographic breakdown of the intervention sample by gender, language, ethnicity, age, location, and income relative to the rest of the national population. Much can and needs to be done to support a pro-equity approach to ICT and development—one that will benefit and be inclusive to nations and all their citizens.

6. Dos and Don’ts in Monitoring and Evaluation

T. Unwin & B. Day

There are many things one should do to enhance the impact and effectiveness of ICT4E programs. And, there are concomitant things that one should not do. Knowing which is which in this matrix is not as obvious as it may seem. This chapter draws together the key recommendations of the previous chapters. For the policy maker, the list provides a quick way into the prospects and opportunities that one or another program may encounter in an M&E effort; for the program director, the list provides cautions concerning potential pitfalls. Overall, any list of do’s and don’ts needs to be understood as a set of issues to be confronted and dealt with—a summation of the experience gleaned from the record to date.

FINAL COMMENT

The present Handbook should be seen as a working document—rather than an academic study—that moves the field of ICT4E ahead in demonstrable ways. While it is more comprehensive than a manual, in that it provides conceptual and empirical approaches that are derived from the research and evidence gathered to date, it is meant primarily to be of practical value.

Our collective concern is the same as that of many donor organizations as well as NGOs: Development programs that have utilized ICTs are often left in very vulnerable political and fiscal conditions due to a lack of evidence about ‘what works’ in their programs—both specifically and generally. By helping to create a stronger knowledge base through improved M&E, it is hoped that the tangible support for ICT4E innovations and investments will be at least as great as the hopes that many have for its potential in promoting both equity and development around the world.

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One of the Millennium Development Goals (MDGs) is achievement of universal primary education by 2015. We must ensure that information and communication technologies (ICTs) are used to help unlock the door to education. Kofi Annan (2005).1

OVERVIEW

DANIEL A. WAGNER

One of the Millennium Development Goals (MDGs) is achievement of universal primary education by 2015. We must ensure that information and communication technologies (ICTs) are used to help unlock the door to education. Kofi Annan (2005).1

MDGs, ICT, AND EVALUATION AS KNOWLEDGE: WHY THIS HANDBOOK?

The Millennium Development Goals (MDGs) have been adopted by the United Nations as the key development targets for the first part of the 21st century. Among the most prominent of these goals are those related to education—namely, to achieve universal primary education and promote gender equality, and empower women by eliminating gender disparity at all education levels. These build upon the Education For All (EFA) initiative begun in Jomtien (Thailand) in 1990, and reaffirmed at a second EFA meeting in Dakar in 2000.2

The MDGs also set as a target to, “in cooperation with the private sector, make available the benefits of new technologies, especially information and communications.” This item is a reference to a growing and increasingly important area that has seen huge growth over the past decade, namely Information and Communications Technology (ICT) for education.

MDG-relevant ICT investments have grown significantly in recent years.3 As noted by the UN Secretary-General Kofi Annan, ICT has the power to “unlock” doors in education. The irony, however, is that ICT may also lead, literally, to “locked” doors, as school directors try to ensure the security of equipment from one day to the next. While there is clearly much promise in the use of ICT for education, there is, at the same time, a widespread ignorance of the specific impact of ICT on education goals and targets.

WHAT IS ICT?

ICT consists of hardware, software, networks, and media for the collection, storage, processing, transmission, and presentation of information (voice, data, text, images).—Defined in the Information & Communications Technology Sector Strategy Paper of the World Bank Group, April 2002.

KEY POINTS

- Improvements in education and increased access to ICT are two prominent objectives of the internationally supported Millennium Development Goals.
- Much hope has been invested in the expanded use of ICT4E for education (ICT4E), but there is also wide-known ignorance of the consequences or impact of ICTs on education goals and targets.
- A relevant and credible knowledge base is essential to helping policy makers make effective decisions about ICT4E.
- This handbook presents a conceptual framework that takes into account not only a variety of broad development concerns, but also the many context-specific, sensitive issues related to ICT4E.
- A stronger knowledge base through improved monitoring and evaluation is likely to lead to increased support for ICT4E innovations and investments.

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2 UNESCO (1990, 2000). In the Dakar meeting, item 69 explicitly states: “Information and communication technologies (ICT) must be harnessed to support EFA goals at an affordable cost.”
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The issue is not whether ICT is "good" or "bad", rather it is how to choose wisely from the large menu of ICT4E options. This is, simply put, a cost-benefit analysis. Creating a relevant and actionable knowledge base is a first step in trying to help policy makers make effective decisions. This is essential in the case of ICT4E for which—unlike, say, improved literacy primers—there are high entry costs (such as investments in new infrastructure), significant recurrent costs (maintenance and training), and opportunities for knowledge distortions due to the high profile (and political) aspects of large ICT interventions.

BUILDING THE ICT4E KNOWLEDGE BASE: ROLE OF MONITORING AND EVALUATION

Monitoring and evaluation (M&E) of development activities provides government officials, development managers, and civil society with better means for learning from past experience, improving service delivery, planning and allocating resources, and demonstrating results as part of accountability to key stakeholders. World Bank, 2004.4

It has been said: "If you think education is expensive, try ignorance." (attributed to Derek Bok5). This same ignorance can be, and has been, very expensive in the domain of ICT4E. Anything that can be known to reduce the level of errors in planning is a potentially valuable knowledge commodity. In some countries, even those with a rather large amount of ICT4E investment, relatively little monitoring and evaluation has been done (see, for example, Box1).

Numerous international and national agencies, along with professionals, specialists and program developers in the field, have promoted ICT use in education, believing it will lead to a breakthrough in learning, and allow one to "leapfrog" in terms of social change and economic development. Yet the empirical support for a wide variety of claims concerning development (at individual, institutional, and national levels) is without concrete and credible data to support them, and many key development questions remain largely unanswered (see box 2).

box 1 Senegal: In need of monitoring and evaluation studies

The majority of governments in Francophone West Africa now recognize ICT as being necessary to achieve “Education For All” goals, and the region has implemented a multitude of new ICT4E projects. However these have few clearly defined objectives; are not connected with national education strategies; and do not include substantial Monitoring and Evaluation studies.

The evaluation of the impact of ICT is the education sector remains subjective and is often based on what is deemed “common sense” as well as testimonies of key actors (learners, professors and administration). In spite of (or perhaps because of?) this, the general public perception of the impact of ICT4E remains vague.

In Senegal, for example, one of the more economically advanced Francophone countries in this field, parents of pupils do not hesitate to pay the costs related to connection of schools and allowing their children access computer rooms; moreover, even school teachers often approve going to work in schools with insufficient ICT support. In sum, there is a belief—even without scientific data—that ICT is good for a school’s overall “health.”

Yettich is recognition among specialists in Senegal that in-depth research on the impact of ICT4E has yet to be done, especially for secondary schools (where most investments have been made to date). In such secondary schools, ICT already serves as a complement to traditional teaching and learning. In the majority of schools in Senegal, even the teachers do not see the role of ICT in the school's overall “health.” One could ask: With whom are the teachers comparing their school with those that are not equipped with computers (the majority)? Also, there appears to be some evidence that many teachers are becoming more familiar with the use of ICT, as a tool for improving their own teaching. Yet, it is not clear what these small changes are worth.

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4 http://www.worldbank.org/oed/ecd/
5 http://en.thinkexist.com/quotes/derek_bok/
7 Boubakar Barry, Universite Cheikh Anta Diop, personal communication, August 2005.

6 Monitoring and Evaluation of ICT in Education Projects

6 Monitoring and Evaluation of ICT in Education Projects
These and other key development questions must be answered within a broad development context in each country, and sometimes regionally within and across countries. From a policy maker’s perspective, these results can be thought of as an impact evaluation (see Box 3), which is part of the broader monitoring and evaluation process.

A CONCEPTUAL FRAMEWORK FOR MONITORING AND EVALUATION

In this Handbook, we have tried to adhere to a conceptual framework that takes into account not only a variety of broad development concerns, but also the many context-sensitive issues related to ICT use for educational development. Current development thinking posits that to foster sustainable development, policies must go beyond supporting economic growth, and provide the human and social infrastructure for economic growth and development in the long term. Thus development policies should minimize distributional inequities, provide resources for the development of physical infrastructure and human capital, and develop the society’s capacity to create, absorb, and adapt to new knowledge, including the reform of its education system and R&D capacity.

Within education, reform is needed to revise the curriculum, improve pedagogy, reinforce assessment, develop teachers, and to bring the education system into alignment with economic and social development policy goals. The use of ICT—and ICT impact—must be considered within this broad development context. Some countries have developed ICT master plans that specify the ways in which ICT can support educational development. Policies must go beyond supporting economic growth, and provide the human and social infrastructure for economic growth and development in the long term. Thus development policies should minimize distributional inequities, provide resources for the development of physical infrastructure and human capital, and develop the society’s capacity to create, absorb, and adapt to new knowledge, including the reform of its education system and R&D capacity.

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The plan for M&E must also indicate the human resources required (such as teacher training) that are needed, including training in equipment operation, software use, and instructional integration. It would not make sense to evaluate the outcomes of the intervention without first assessing the extent to which these intervention components were implemented.

The first step of the monitoring and evaluation (M&E) process should specify a plan to measure the implementation fidelity of the intervention. The M&E plan should then design measures of the intended outcomes, with a notion of how they might feed into the more “downstream,” and less easily measurable, but desirable long-term development goals. Also, the design of the M&E plan should specify the analyses that would account for—either experimentally or statistically—the other moderating factors that would influence the success of the intervention, such as the level of community support, the availability of digital content in the appropriate language, and the extent to which ICTs are also available in the home or community. One way to conceive of these factors may be seen in Figure 1.

Based on this conceptual framework, operational definitions—both rigorous and measurable—are needed for desired learning outcomes (skills and attitudes), as well as acceptable methodologies and indicators that can be used (after likely adaptation) to consider the impact of ICTs in education. There is also a need, we believe, to expand current definitions of basic skills to account for what we term the notion of a ‘broader literacy’, that would include, where appropriate, information literacy and numeracy skills (e.g., information analytical and search skills, statistical reasoning, and so forth), as well as desired social and economic outcomes.

Finally, and perhaps most importantly, it needs to be understood that M&E is an imperfect science, but like any scientific endeavor, one builds on the accumulated knowledge (and yes, mistakes) of one’s forebears. Thus, this Handbook, as detailed in the next section, will begin with an historical review of M&E impact studies—and then consider the key issues of M&E in ICT for education today and tomorrow.

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**FIGURE 1 Conceptual Framework for ICT**
AUDIENCE AND PURPOSE

The primary audience for this Handbook is expected to include policy makers, program implementers and evaluation specialists. However, the exploration of issues herein is related to the effective use of ICTs in education more generally, and will hopefully be of interest to a broader audience including officials in a variety of ministries, agencies and higher education institutions around the world.

Our goal—and principal priority—is to provide pathways toward contributing to a credible evidence-based future of ICT for education in the development process. Our focus is on less developed countries (LDCs)—and particularly the most challenging and poor populations in the world—we hope that the concepts, methods and tools mentioned in the Handbook will be of value in any country where ICT4E is a serious matter of consideration and policy planning.

It must also be said that this is a brief Handbook, not a fully comprehensive one. Our goal was to cover enough of the territory to get key people moving in the right directions. But we have not covered all directions. Indeed, in the fast changing domain of ICTs, providing an ‘up-to-date’ comprehensive volume would be nearly impossible—it would be out-of-date by the time it was published! Nonetheless, the interested reader should look at the Key References at the end of each chapter, as well as the Annex, as both contain useful website URLs that connect to further information, some of which is likely to have very current information that was not available at the time we worked on the Handbook.

KEY REFERENCES


1. MONITORING AND EVALUATION OF ICT FOR EDUCATION IMPACT: A REVIEW

ROBERT B. KOZMA

Executive Summary

A REVIEW

In a world of constrained resources, it is no surprise that measuring impact should be near the top of the development agenda. Without demonstrated impact, why would anyone invest in development work, with or without technology? How do we claim credible evidence of impact? In the ICT domain in particular. Are there specific ways to define and measure impact?

Technology advocates describe a range of potential impacts that ICT can have when applied to education. These include:

- Student outcomes such as increased knowledge of school subjects, improved attitudes about learning, and the acquisition of new skills needed for a developing economy. Beyond learning outcomes, ICT may help close the gender gap, and help students with special needs.
- Teacher and classroom outcomes such as development of teachers’ technology skills and knowledge of new pedagogical approaches, as well as improved mastery of content and attitudes toward teaching.
- Other outcomes such as increased innovativeness in schools and increased access of community members to adult education and literacy.

With the promise of these outcomes, government policymakers and NGOs in developing countries have put computers in schools and connected them to the Internet provided students with multimedia tutorials and simulations, trained teachers and given them access to new resources, provided schools with management and productivity tools, and established community technology and multimedia centers in villages. These resources represent significant investments, particularly in light of limited resources and competing needs in developing countries. What have we learned from these experiences? To what extent has the potential of ICT been realized? And how do we use what we know to support the Millennium Development Goals?

In this chapter, we summarize the research results on the impact of ICT on students, teachers, schools, and communities. While the large majority of existing studies in these areas are from OECD countries, the results coming in from developing countries support similar conclusions. We will address some of the studies from the developing region to provide a basis for understanding the benefits and limitations of the various study designs that were deployed. Finally, we draw some conclusions of immediate relevance to policymakers.
1.1 STUDENT OUTCOMES

1.1.1 Impact on learning of school subjects

The most pronounced finding of empirical studies on ICT impact is that there is no consistent relationship between the mere availability or use of ICT and student learning. Two major studies in the U.S. found a positive relationship between availability of computers in schools and test scores. A study in Australia found no relationship between computer availability in schools and test scores. Two large studies, an international study by Fuchs and Wessman involving 51 developed and emerging countries, and another by Wenglinsky surveying U.S. schools, found a negative relationship between the availability of computers in the home and achievement scores.

However, digging more deeply into these and other student outcome studies, it becomes clear that the relationship between ICT and student learning is more complicated. When looking at communications or educational uses of home computers the researchers found a positive relationship with achievement. Also in this study, students who occasionally used computers in schools scored higher than those who never used them or those who used them regularly. But even these results are misleading. Students in this study were tested on mathematics and reading but the data collected on computer use was general, even the educational use was not specific to math or reading. In order to understand the connection between the input (computer use) and the output (learning in school subjects), it is essential to have the learning measurement directly correspond to subject area in which the technology is used.

Some studies have looked at this direct relationship. For example, the Wenglinsky study cited above measured the amount computers were used in mathematics classes and scores on math tests. The study found a positive relationship between the use of computers and learning in both 4th and 8th grades. Similar positive relationships have been found in OECD countries between computer use for specific school subjects and scores in those subjects for mathematics, science, and literacy. Still, some studies in mathematics have found negative relationships between computer use and scores.

Conclusions from such studies are limited by the fact that they use correlation analysis. With this type of analysis, factors are simply associated with each other. It cannot be concluded with confidence that one causes the other; the question often asked by most policymakers. For example, it may be that the brightest students use computers most and it is student ability that accounts for higher scores rather than computer use. Causality can only be assured with controlled experiments, where one group uses computers or uses them in a certain way and an equivalent group does not. An example of this type of experimental study was conducted in Vadodara, India in which students in primary schools used computer mathematics games two hours a week and students in equivalent schools did not (Box 1.1). The students who used computers scored significantly higher than the comparison students on a test of mathematics. The bottom group of the students benefited most and girls benefited as much as boys. One important limitation of this field-based experiment is the lack of a theory (and supporting analyses) of why some students gained more than others. Only by doing more in-depth data collection and analyses would usable policy outcomes become apparent.

While the Vadodara study is quite useful, especially as it relates to the design of M&E projects, we can draw conclusions with the most confidence when they are consistent across a substantial number of experimental studies.

1 National Center for Education Statistics, 2001a, 2001b
2 Brick, Cresswell, & Ashley, 2003
3 Fuchs & Wessman, 2004
4 Wenglinsky, 1998
5 Fuchs & Woessmann, 2004
6 NCES, 2001a; Cox 2003
7 NCES, 2001b; Harrison, et al., 2003
8 Harrison, et al., 2003
9 Aungst & Iana, 2001; Pelagia & Plomp, 2002
10 Lodico, Barnowie, & Dufoe, 2003
11 Linden, Banerjee, & Duflo, 2003
12 Monitoring and Evaluation of ICT in Education Projects
Across 75 studies, the findings can be summarized as follows: students who used computer tutorials in mathematics, natural science, and social science scored significantly higher on tests in these subjects. Students who used simulation software in science also scored higher. However, the use of computer-based laboratories did not result in higher scores.

Primary school students who used tutorial software in reading scored significantly higher on reading tests. Very young students who used computers to write their own stories scored significantly higher on measures of reading skill.

Students who used word processors or otherwise used the computer for writing scored higher on measures of writing skill.

We can have substantial confidence in such findings, at least as far as OECD countries are concerned, and as long as the demographics, technologies, and school contexts do not change substantially over time. Yet even though the U.S. findings tend to run parallel to the Vellore example above, it is important to consider how context and developments over time may affect outcomes. For example, early educational applications of ICT in the 1970s and 1980s in the U.S. focused on tutorial, drill and practice, word processing, and programming. Later applications used networking and the increased power of computers for visualizations and multimedia, simulations, microcomputer-based science laboratories, and Web searches. These different applications are likely to focus on different classroom practices and outcomes.

Such changes will continue to occur as the technology develops in the future, and their varied and differential use by target populations may well affect the outcomes produced. Naturally, the cultural and socio-economic context will also have a major role in the impact of any ICT intervention.

1.1.2 Impacts beyond the curriculum: Student motivation, new skills

ICT can have an impact on students beyond their knowledge of traditional school subjects. A number of studies have established that computers can have a positive effect on student motivation, such as their attitudes toward technology, instruction, or the subject matter. For example, the Kalu study found that students using computer tutorials also had significantly more positive attitudes toward instruction and the subject matter than did students receiving instruction without computers. This finding corresponds to that in a comparative study conducted in physics classes in Kenya, where two randomly assigned classes used computer-based instruction, while a third equivalent group did not.

Students in the computer sections learned physics concepts better and expressed positive attitudes about their physics learning, as ascertained in interviews at the end of the lessons.

BOX 1.1 India: An experiment using ICTs in primary schools

In a comparative study conducted in physics classes in Kenya, where two randomly assigned classes used computer-based instruction, while a third equivalent group did not. Students in the computer sections learned physics concepts better and expressed positive attitudes about their physics learning, as ascertained in interviews at the end of the lessons.

Adapted from: Linden et al., 2003
Students also learn new skills that go beyond traditional school knowledge. Many technology advocates argue for the inclusion of a more sophisticated set of "21st Century skills" in the curriculum in order to promote economic development\(^\text{16}\). They claim that the use of ICT can support the learning of such skills as technology literacy, information management, communication, working in teams, entrepreneurship, global awareness, civic engagement, and problem solving.

One example that promotes these skills is the World Links program, in which African and Latin American secondary teachers and students use networked computers to support student-centred pedagogy (see Box 1.2). In the evaluation of this program\(^\text{17}\), both students and teachers more often reported that "World Links students learned communication skills, knowledge of other cultures, collaboration skills, and Internet skills. In addition to these self-reported data, a connected study in Uganda used a specially designed performance assessment to directly measure student learning of these skills"\(^\text{18}\). The study found that World Links schools outperformed the non-World Links schools on measures of communication and reasoning with information.

### 1.1.3 Impact on diverse students

An important Millennium Development Goal is to achieve gender equity. If girls are to leave school ready to participate equally in the economy, they too will need the benefits of ICT; increased knowledge of school subjects and new skills, including ICT skills. However, much of the research in OECD countries shows a gap indicating that boys have more experience with technology than girls and that girls are more anxious about technology than boys\(^\text{19}\). Fortunately, studies also show that greater experience with computers results in improved attitudes among girls. Many technology-supported programs in developing countries focus on including girls’ use of computers, and data on impact often shows no gender gap. For example, girls and boys learned equally from the use of computers in the Vodadara study cited earlier\(^\text{20}\). In the World Links evaluation, teachers reported no difference between girls and boys in a wide range of learning outcomes related to computer use\(^\text{21}\). In Andhra Pradesh (India), Wagner and Daswani\(^\text{22}\) have reported that poor girls learn more than boys in a non-formal ICT-based literacy program, when controlled for years of schooling (see Box 5.1 in Chapter 5).

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**BOX 1.2 World Links Program in Less Developed Countries**

The World Links Program, originally managed by the World Bank and subsequently by a spin-off NGO, places Internet-connected computers in secondary schools and trains teachers in developing countries in Africa, Latin America, the Middle East, and South and Southeast Asia. The goal of the program is to improve educational outcomes, economic opportunities, and global understanding for youth through the use of information technology and new approaches to learning. Services provided by the program include:

- Flexibility and consultation on connectivity solutions and Internet management.
- Workshops for policymakers on coordination of policies and implementation strategies.
- Workshops for teachers on uses of technology in the context of innovative pedagogy.
- Feasibility studies and consultation on connectivity solutions and Internet management.
- Workshops for policymakers on coordination of policies and implementation strategies.

As of 2005, the program has involved over 200,000 students in over 20 developing countries. The three-year evaluation of the program used a combination of approaches that included surveys of teachers, headmasters, and students, as well as direct assessment of student learning. Teachers and students in participating schools were compared with comparable students in equivalent non-participating schools.

Adapted from Kozma, et al. (2004).

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Adapted from Kozma, et al. (2004).
ICT can benefit very diverse types of students. There is also quite consistent evidence, at least in the Western research literature, that students with disabilities, indigenous (minority language speaking) students, and students from low income homes all experience growth in their sense of self-esteem and autonomy in their learning when given access to computers in the context of student-centered pedagogy. Further discussion of this area, with examples from developing countries, is provided in Chapter 5.

1.2 TEACHER AND CLASSROOM OUTCOMES

1.2.1 Impact on teacher skills and motivation

Many governments are using the introduction of ICT as a way of providing teachers with new skills and introducing new pedagogy into the classroom. For example, teachers participating in the Enlaces program in Chile receive two years of face-to-face training consisting of at least 100 hours. As a result, teachers acquire familiarity with computers and use them regularly for tasks that are professional (e.g., engaging in professional circles, e-learning), managerial (e.g., student marks, parental reports) and out-of-classroom (e.g., searching for educational content on the web, lesson planning).

The World Links program provided 200 hours of teacher training which included an introduction to ICT, use of the Internet for teaching and learning, use of tele-collaborative learning projects, integration of ICT into the curriculum and teaching, and innovative pedagogical approaches. The evaluation of the World Links program found that a large majority of teachers and their administrators reported that teachers learned their new computer and teaching skills, and gained more positive attitudes about technology and about teaching.

1.2.2 Impact on classroom practice

The use of ICT has often been thought to bring significant changes into classroom practice. This was evident from school surveys conducted in 26 countries and a series of case studies conducted in 27 countries in Europe, Asia, North America, South America, and Africa. These studies and others show that innovative classroom use of computers depends not just on the availability of computers in schools but also on other factors such as administrative support, teacher training, and supportive plans and policies.

The extensive teacher training provided by the World Links program resulted in teachers not only learning new skills but also changing their classroom practices. World Links teachers and students more often used computers to engage in a wide variety of new practices than did non-participating teachers who also had access to computers. These practices included conducting research projects, gathering and analyzing information, collaborating on projects with students in other countries, and communicating with parents and other community members.

However, there are also significant barriers to widespread ICT-supported change in classrooms in developing countries, such as lack of time in the curriculum and school day, lack of skilled personnel, and lack of infrastructure, including power, telecommunication access, and Internet service providers. National policies can address many of these barriers and make a difference in widespread use of ICT to change classrooms.

When countries commit to coordinating the introduction of computers with changes in the curriculum, pedagogy, and teacher training, changes in classroom practices are more likely to be widespread. For

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1.3 BROADER CONTEXTUAL OUTCOMES

1.3.1 Impact on schools

It is sometimes claimed that the introduction of ICT into schools can significantly transform school organization and culture28. However, the causality in this relationship is likely bi-directional: the introduction of technology promotes organizational change in schools, and transformed school organization can increase the use and impact of ICT. An OECD study of ICT-supported school change in 23 countries29 provides evidence that the introduction of computers can be used as a lever to launch the cycle of ICT-supported organizational change in schools. To date, there is a dearth of research in developing countries on the school-level impact of ICT and future research needs to address this deficiency. In one recent example (see Box 1.3) in Thailand, there was an effort to utilize low-cost handheld devices. While the work is intriguing,—as with many studies to date, the M&E aspect is too limited for firm conclusions to be drawn.

1.3.2 Impact on communities

The introduction of ICT via community technology centers or multimedia centers, in a variety of geographical locations, can also address MDGs related to education and economic development, according to a significant body of research in developing countries30. Typically, these programs utilize a mix of technolo-

example, Costa Rica introduced computers in primary schools in rural and marginal urban areas along with the Logo programming language and other software tools to support constructivist pedagogy and collaborative classroom activities to develop students’ cognitive skills and creativity31. The Enlaces program in Chile is a nation-wide effort that introduced networked computers into secondary and primary schools in conjunction with a national reform effort that encouraged the use of project-based learning and small group collaboration32. As a result, computers are widely used in Chile along with new classroom practices.

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gies—such as a radio, video, computers, and Internet access—that are used by established community-based service agencies. They provide community members with information and services related to ICT skills, adult literacy, and education for out-of-school youth, especially girls. However, most of the literature in this area is descriptive and does not systematically assess the impact of ICT on education and community development. Impact research is needed. At the same time, it is important to note that many of these efforts are still in the early phases, and evaluations should be sensitive to fact that these services do not result in “quick fixes.”

1.4 SUMMARY AND IMPLICATIONS

1.4.1 Impact of ICT on education

The research to date on ICT on education has provided us with important findings that are relevant to policymakers and to the Millennium Development Goals. The most important may be summarized as follows:

- The mere availability or use of computer does not have an impact on student learning. However, results are clear that certain uses of computers in specific school subjects have a positive impact on student learning in those subjects.
- Specifically, computers have a positive impact on student attitudes and the learning of new kinds of skills, when ICT is used in conjunction with student-centered pedagogy.
- Computers may benefit girls and boys equally and can be effectively used by students with special needs.
- Teacher training is important. Through it, teachers can learn ICT skills and new pedagogical skills and these often result in new classroom practices.
- ICT can also be used to launch innovation in schools and provide communities with new educational services.

1.4.2 Limitations of current research

There are important limitations to the research conducted on impact to date, and these have implications for future studies.

- Most studies have been conducted in OECD countries, and these represent the particular circumstances and concerns of policymakers and researchers in these largely industrialized countries. While MIKE studies are starting to emerge in developing countries, more are needed in order to support—or call into question—claims of success.
- Studies that rely on correlation analyses are open to multiple conclusions. Well-designed experimental studies would provide greater confidence, but at increased cost (see Chapter 3).
- Case studies provide the most detail about how ICT is used in classrooms, and they can provide practitioners with information to use when implementing ICT programs. Priority should also be given to conducting case studies and structuring them to be useful to practitioners.
- Impact research results are not static, but rather—and especially in the fast-moving area of ICT—must be seen as subject to change over time. For example, the impact on grades of touch-typing skills or web access in the year 2000 is likely to be very different from that 5 or 10 years later, when speech recognition is widely available, whether the person is living in Brazil or the United Kingdom.

1.4.3 Implications for policy

- Since computer availability alone will not have an impact, policymakers and project leaders should think in terms of combinations of input factors that can work together to influence learning. Coordinating the introduction of computers with national policies and programs related to changes in curriculum, pedagogy, assessment, and teacher training is more likely to result in widespread use and impact.
- Policymakers in developing countries also need to address the barriers to ICT use. These will vary from country to country, but they may include a lack of skilled support staff and adequate infrastructure.

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Policymakers in developing countries also need to address the barriers to ICT use. These will vary from country to country, but they may include a lack of skilled support staff and adequate infrastructure.
Program monitoring and evaluation can provide policymakers and program directors with important information on the success and impact of their policies and programs related to ICT. These efforts should be adequately funded and they should be integrated into the initial planning process.

KEY REFERENCES FOR THIS CHAPTER:


2. CORE INDICATORS FOR MONITORING AND EVALUATION STUDIES IN ICTS FOR EDUCATION

ROBERT B. KOZMA AND DANIEL A. WAGNER

Executive Summary

An indicator is a piece of information which communicates a certain state, trend, warning or progress to the audience.

Core indicators are, simply put, the ways we come to understand the inputs and outcomes of a program or project that we may or may not be able to observe directly. In Chapter 1, we identify a variety of factors that can impact program outcomes. In this chapter, we concentrate on those indicators that are most relevant and immediate to ICT-supported educational programs and projects, what we term core indicators. In addition, we examine indicators of longer-term outcomes, the national context, and program costs. Specifically, we examine ways to measure or describe:

- **Input indicators**—including, for example, the type of ICT equipment and/or software and/or organizational design features deployed in a classroom or setting.

- **Outcome indicators**—including, for example, student and teacher impacts (cognitive, affective and attitudinal).

- **National educational and socio-economic indicators**—including, for example, educational enrollment rates, gross domestic product, human development indicators (such as gender equity, literacy, etc.) that characterize and distinguish a country and enable and/or constrain a project or program.

- **Cost indicators**—including, for example, fixed, variable and recurrent costs.

We begin the chapter with a discussion of general issues related to the monitoring and evaluation as well as the selection and use of indicators. We then review various indicators that have been used in a variety of settings in various countries.

2.1 MONITORING AND EVALUATION: PROVIDING OPTIONS FOR DECISION-MAKERS

Monitoring and Evaluation (M&E) seems like (and often is) a technical exercise, designed by and used by technical experts and researchers. In fact, like all numerical data of this kind, the ultimate purpose of the M&E ‘exercise’ is to provide useful information to decision makers. This is not always obvious or easy to do, largely because engaging in an adequate M&E process may require a team of specialists who work on:

- The choice of core indicators in ICT4E is the key to determining the impact of technology on student and teacher knowledge, skills and attitudes.

- In order to understand the outputs of any program, inputs must also be measured, such as ICT resources, teacher training, pedagogical practices, and the educational, technological, and social context.

- Outputs should be measured against these same variables as well as costs.

- Data should be collected throughout the program’s implementation, and in sufficient breadth and depth such that conclusions have credibility with the consumer of the study.

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1 Sander, 1997
Monitoring and Evaluation of ICT in Education Projects

22.2 INDICATOR SELECTION: PROBLEMS AND POSSIBILITIES

While indicators are easy to define, it is not always easy to select the right ones to study. For example, one can indicate the literacy level in a household by asking the head of household whether there are family members who are literate—this is termed an “indirect” measure of literacy because it does not directly assess the skill of the individual. As it happens, this is precisely how most literacy census data are still collected in developing countries. One might find it more relevant in some cases to ask for the mother’s literacy level, as that is an excellent “proxy” indicator of literacy skill of children in developing countries, and more directly predictive of positive social and economic outcomes. Of course, one could also measure literacy skills via a test for reading or writing skills on a variety of items—a “direct” measure of skill. Each of these indicators, and others, has been widely used to measure literacy in global education reports. Direct measurement tends to be more reliable, but also more expensive to implement. Indirect and proxy measures are less reliable but may also be less expensive.

Further, the designation of a particular factor as an “input” or an “outcome” is somewhat arbitrary, since each of these are often the intended impacts of ICT-supported educational programs or projects. For example, increases in the number of computers in schools or changes in pedagogical practices can be considered intended “outcomes” of some ICT-supported programs and they are technical aspects that have only minor connection to broader policy questions. This can be as true in judging a matter of environmental impact as it is on educational impact using ICTs.

Thus, the purpose of M&E is to provide credible options based on the best information that can be gathered to support one or another decision. One of the first choices that must be made concerns the breadth and depth of the M&E task. Naturally, this is as least partly determined by the resources that can be made available (see Chapter 3). Yet, there are also conceptual issues in breadth and depth. For example, is a broad national representative sample necessary in order to justify the impact of a major ICT4E implementation of, say, computer labs in secondary schools? If a large (and perhaps debatable) investment has been made, then only a broad, large-scale study might convince policy makers that either more of the same is required, or that a change in policy is needed (say, if the PCs were poorly utilized and understaffed). Alternatively, if an NGO set up a small number of very innovative Internet-enabled kiosks which provide health education information, it might be most appropriate to undertake an in-depth ethnographic case study of how the health information was used in real time, and whether it had impact on healthy behaviors.

Thus, M&E can take many forms when put into practice in specific contexts. However, the universe of M&E studies, while varied, can be straightforward if one understands the available options. For a quick sampling of M&E approaches, as related to both indicators and instruments, see Table 2.1. In this table, we can see that case studies, ethnographies, sample surveys, and direct assessment can all play meaningful roles in M&E, but the choice of tools will depend on both the questions asked and the resources available. A more detailed M&E planning methodology will be provided in Chapter 3.

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treated this way in Chapter 1, but they may also be considered as "inputs" in order to achieve a particular set of learned skills.

How do we pick the right indicators for a particular evaluation? Fortunately, there are some guidelines, and previous experiences in the ICT impact domain, that can guide our choices. Nearly a decade ago, the International Development Research Center published a planning document that has been used by a number of ICT in education groups, particularly with field-based programs in mind (see Box 2.1).

### TABLE 2.1. Examples of Implementations and M&E approaches

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<thead>
<tr>
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<th>Sample Selection</th>
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<td>What did teachers learn, and did they change their teaching practice? Further, were their students affected by teachers who participated in this intervention?</td>
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**Core Indicators for Monitoring and Evaluation Studies in ICTs for Education.**
Another issue in selecting indicators is the tension between context sensitivity and change over time. There is a longstanding debate in the evaluation field, between context specificity and universality⁷, and between adaptation to changing circumstance and the stability of measurement over time. We shall see in this chapter, as in the Handbook as a whole, that the dual dilemmas above are features that must co-exist with effective M&E.

The conceptual framework introduced in the Introduction identifies a variety of factors that can impact on ICT skills and student learning achievement. Some of these factors may appear somewhat removed from direct ICT intervention, such as the national economy, social development context, or the education reform context. Other context factors are more immediate, such as those related to ICT use in the home, amount of local school support, and the availability of digital education materials. However selected, core indicators need to relate to specific components of the ICT intervention and their implementation.

2.3 INPUT INDICATORS

2.3.1 Classroom ICT resources

It is important to specify the ICT inputs—amount, type, and location of ICT resources—when determining the role that ICT played in student knowledge, skills and attitudes. These need to be identified and described whether or not an increase in the number of these resources is an explicit part of the ICT-supported program. If increasing the amount of, and access to ICT is an overt goal, then ICT resources should be measured both as a baseline variable and later as an outcome. Of course, there are many ways to measure ICT resources or infrastructure, some of which are illustrated in Box 2.2.

2.3.2 Teacher training

Teacher quality is also a very important input (and potential outcome) of ICT for education programs and projects. Indeed, as shown in the review of Chapter 1, the level of qualification and training of teachers has been shown to be one of the key factors in the success of ICT for education programs. UNESCO⁸ has identified a number of training indicators that include percentage of teachers who received training, type of ICT training (basic or advanced), length of training, and percentage of teachers who use computers for teaching. The International Society for Technology in Education⁹ has also developed a set of standards for teacher training (shown in Box 2.3).

2.3.3 Classroom pedagogy

As we saw in Chapter 1, the way ICT is used in the classroom can make a big difference in the impact of an ICT-supported program or project.

Another issue in selecting indicators is the tension between context sensitivity and change over time. There is a longstanding debate in the evaluation field, between context specificity and universality⁷, and between adaptation to changing circumstance and the stability of measurement over time. We shall see in this chapter, as in the Handbook as a whole, that the dual dilemmas above are features that must co-exist with effective M&E.

The conceptual framework introduced in the Introduction identifies a variety of factors that can impact on ICT skills and student learning achievement. Some of these factors may appear somewhat removed from direct ICT intervention, such as the national economy, social development context, or the education reform context. Other context factors are more immediate, such as those related to ICT use in the home, amount of local school support, and the availability of digital education materials. However selected, core indicators need to relate to specific components of the ICT intervention and their implementation.

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2.3.3 Classroom pedagogy

As we saw in Chapter 1, the way ICT is used in the classroom can make a big difference in the impact of an ICT-supported program or project.
ICT use includes the extent to which ICT is integrated into the curriculum and the kinds of pedagogical strategies that are used in association with ICT use. In one international survey conducted primarily in OECD countries, principals identified a number of what were termed positive “emerging pedagogical practices” that were often supported by ICT use (see Box 2.4).

In the World Links evaluation in several developing countries, Kozma and his colleagues surveyed students and teachers on the extent to which students engaged in various classroom practices using ICT (see Box 2.5). The data were not based on observations (i.e., direct measures) by others, but rather on individuals’ self-reports. However, the reliability of these reports was increased by collecting data from both teachers and administrators. Often they agreed that teachers were engaged in these ICT-supported classroom practices.

2.4 OUTCOME INDICATORS

2.4.1 Student knowledge of school subjects

Often the most important outcome targeted by ICT efforts is an increase in student knowledge. Some studies of ICT-supported programs have used self-report indicators, such as asking students, teachers, or administrators if students increased their knowledge of mathematics, science, language or school knowledge generally. These are indirect and typically unreliable measures of school learning; direct assessment of student learning is preferred where possible.

Generally, there are two broad types of direct measures of school learning that have been used in conjunction with ICT-based education projects: (1) national and international assessments, and (2) customized program- or project-specific assessments. In Chapter 1, we reviewed studies that used national and international assessments to measure the impact of ICT on student learning. Typically, these latter indicators do not effectively target the particular sample of students, grades, content subjects or specific uses of ICT being implemented. In this chapter, we focus therefore on the second category, customized designs. Of the various types of measures, customized assessments are the most likely to capture the learning that takes place in ICT-supported programs and projects. On the other hand, critics may claim that customized assessments are too narrowly focused on learning goals that are specific to a program and thus may be biased in favor of the ICT when comparing ICT use includes the extent to which ICT is integrated into the curriculum and the kinds of pedagogical strategies that are used in association with ICT use. In one international survey conducted primarily in OECD countries, principals identified a number of what were termed positive “emerging pedagogical practices” that were often supported by ICT use (see Box 2.4).

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BOX 2.4. Pedagogical practices of teachers

- Students developing abilities to undertake independent learning.
- Providing weaker students with additional instruction.
- Organizing teachers and learners so that differences in entrance level, learning pace, and learning rate are taken into account.
- Students learning to search for information, process data, and present information.
- Students being largely responsible for controlling their own learning progress.
- Students learning and/or working during lessons at their own pace.
- Students involved in cooperative and/or project-based learning.
- Combining parts of school subjects with one another (multidisciplinary approach).

Adapted from Pelgrum and Anderson.

BOX 2.5. Indicators of student practices in the ICT-supported classrooms

- Collaborate on a project with other students in the same class.
- Collaborate on a project with students from another school or in the same country.
- Collaborate on a project with students from another country.
- Exchange information with students from another country.
- Gather and analyze resource materials on a problem or topic.
- Use graphics in a report.
- Collaborate with students from another country or culture.
- Draw conclusions or make predictions using data gathered or obtained from resource materials.
- Communicate with parents or other members of the community about school activities.

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Adapted from Kozma.
outcomes with more traditional instructional approaches. If this is an issue for a particular evaluation, it can be addressed by combining program-specific assessment items with items that are drawn from or similar to those on the more standard assessments, such as the national exam. The analysis can then compare performance of ICT-using and non-using students on both sets of items. Box 2.6 presents some guidelines to follow when designing customized assessments.

2.4.2 Student attitudes

In addition to the cognitive measures of learning, ICT is known to have effective consequences as well. These can include student motivation and attitudes about a particular school subject, about school or learning in general, or about other matters. Such indicators may be assessed through surveys, often self-reports. Reliability of these measures can be increased by using multiple information sources, such as by surveying students, their teachers, and school administrators. If all of these sources agree on an indirect measure, this increases the confidence that the outcome did indeed occur.

2.4.3 Student skills

There are other potential student outcomes beyond attitudes and the knowledge of school subjects. Perhaps the most immediate expected outcome of ICT use is an increase in technological skill and confidence. ICT skills may not be part of the formal curriculum and may not be assessed by national examinations. However, there are several commonly used indicators of technology skills. UNESCO lists indicators that include: number of learners that demonstrate only basic ICT skills, number that demonstrate advanced skills, and the purposes for which they use ICT. The International Computer Driver’s License (ICDL) and variations of it, identify and measure skills related to basic computer concepts, using the computer, managing files, and using word-processing, spreadsheets, database, presentation, and communication software. The advantage of the ICDL is that it is a standard curriculum and assessment of ICT skills that leads to an internationally recognized certificate. This assessment is useful to evaluators as an indication of program success related ICT learning, and it provides the participants with a credential that is recognized by employers. However, the assessment is expensive, and is limited in its scope to skills in using ICT tools.

ISTE has also developed a set of indicators for students’ ICT skills that includes the application of both basic and more advanced ICT tools, such as research tools, decision tools, and problem-solving tools. Unlike the ICDL, ISTE has not developed an assessment. Rather, they have developed a set of standards that

**BOX 2.6. Some guidelines for customized assessments**

- Test complex knowledge, not just the memorization of factual knowledge. Here, students should be designed to measure students’ understanding of important concepts, principles, and problem-solving skills.
- All at least some tasks should be similar to situations in which students might apply their knowledge in the real world outside the classroom. These tasks should be designed so that students will think through processes and problem-solving skills. These are sometimes called performance assessments.
- It is appropriate to use ICT as part of the assessment. Tasks should have students use ICT tools to solve the problems, and should provide appropriate ICT knowledge and skills, as well as their knowledge of school subjects.
- Information that comes from the assessment should not only describe what students know, but should provide program staff and directors, teachers, and even students with information that they can use to improve the program and student learning. This would include the types of errors or misconceptions that students typically exhibited.
- Regular testing throughout the duration of the program, rather than just at the end, will allow evaluators to monitor the progress of the program, allow program staff and teachers to improve the program, and allow students to improve their learning.

Adapted from Bransford et al., Pellegrino et al., UNESCO (ICDL) and variations of it.

2.4.3.1 Learning of ICT skills

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describes the kinds of tasks that students should be able to accomplish with computers and software tools. For example, the NETS standards state that students will be able to “use technology to process data and report results”; or “employ technology in the development of strategies for solving problems in the real world”. These statements are specific enough to develop indicators that can examine the extent to which students have accomplished these standards.

2.4.3.2 Learning of “21st century” skills

With the continuing increase in average schooling attainment across the globe, and the ever-growing interconnectedness of national economies, it is no surprise that skill requirements are also increasing. Indeed, several initiatives have focused on the engagement of students in the use of ICT to measure the advanced, “21st Century” skills that are needed to participate in globally integrated, economic development. These skills include technology literacy, information management, communication, working in teams, entrepreneurialism, global awareness, civic engagement, and problem solving. In one such effort, an assessment system, termed the Integrated Performance Assessments in Technology (IPAT), was developed to generate authentic, “real world” problems (with sets of tasks and questions) requiring students to engage in ICT strategies such as planning, analyzing, and communicating. This system was used to evaluate student learning in the World Links program, an ICT-supported program active in a number of developing countries, specifically Ghana, Paraguay, and Uganda. The IPAT system allows modules to be customized to particular types of technology tools and specific goals, grade-level, and content of a particular ICT-supported program. For example, the World Links assessment tasks asked students to use the Internet to search for information on a specific topic. Students were asked to use productivity tools, such as digital image-capturing software. Tables were used to gather and organize information about the topic, and word processing and graphics tools were used to communicate findings in a newsletter. Rubrics specified the criteria of adequacy for the quality of technology use (productivity and Internet tools), problem-solving strategies (analysis, comparison, prediction), and communication (thesis, supporting evidence and reasons, organization).

2.4.4 Systemic outcomes

Policy makers are naturally concerned with the impact that ICT programs might have on systemic education indicators such as enrollment rates, pass rates and dropout rates—each of which is rather easily measured directly. These have been used widely in all types of M&E efforts. Fortunately, most ministries of education already have on hand the relevant data on the above systemic indicators.

2.4.5 Teacher outcomes

Teacher learning can also be an important outcome of an ICT-supported educational program or project. Many programs have teacher training components, and the goal of this training is to increase teachers’ knowledge of ICT or the pedagogical knowledge related to the integration of ICT into the curriculum and their classroom practice. These learning outcomes can be assessed directly, but more often they are measured indirectly through self-report surveys. In the World Links evaluation, for example, a number of self-reported questions were provided to teachers, such as their knowledge of computer hardware; software applications; the Internet; Web page development; student groups in teaching; collaborative student projects; and design and use student assessment materials; and how to integrate computers into the curriculum.

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Another approach is to consider teacher attitudes, as was done in a study in Costa Rica (see Box 2.7). In any case, the reliability of such indicators can be increased by collecting information from more than one source, such as from both teachers and administrators.

Building ICT skills is often a goal of teacher training programs, and such skills are a necessary prerequisite for the implementation of ICT in the classroom.

2.4.6 Long-term outcomes

Often the investment in ICT-supported education programs is justified by their longer-term social and economic impacts, such as higher life satisfaction, higher income, improved health, and increased economic competitiveness and access to the global economy. Many of these anticipated outcomes are related to the internationally supported Millennium Development Goals, such as level of poverty, gender equity, literacy, and health. More often these factors are considered the context for ICT programs; usually, the indicators that are used to measure such factors are provided in a general section on economic and social context. While it is fairly easy (although often expensive) to measure some of these indicators, it is much more difficult to attribute any changes in them to the specific introduction of ICT-supported education programs or projects because of the complex mix of educational, social, and economic variables that influence these indicators and the length of time needed to affect change.

However, one way to approach this is through the use of tracerc studies. In these studies, a number of students in the target program and perhaps some that did not participate in the program are followed for several years afterwards. Measures of graduation rates, final average grade, tertiary matriculation, type of initial employment, and so on, can be used to estimate what the longer term impacts will be.

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2.5 NATIONAL EDUCATIONAL AND SOCIO-ECONOMIC INDICATORS

2.5.1 National educational context

There are significant economic, technological, and educational contextual factors that enable—or more often in developing countries—constrain the potential impact of ICT-supported education programs. Identifying and describing these factors in an evaluation will provide a greater understanding of the national context for program development.

There are two types of educational indicators that need to be considered: those which pertain to the general educational system; and those which are particular to ICT for education (see Box 2.8).

Based on such indicators, as reported by agencies such as the World Bank, UNESCO, and UNDP, policy makers have an opportunity to relate both inputs and outcomes of ICT-based projects to independently developed indicators.

2.5.2 National infrastructure context

The use of ICT in schools is very much dependent on the national ICT infrastructure. The extent to which power, telecommunications, and Internet service are generally available, even in remote and rural areas, will influence the extent to which an ICT-supported program can be successful. The “digital access index” used by the International Telecommunications Union is a compilation of indicators that describes a country’s information infrastructure (see Box 2.9).

Often there is a significant "digital divide" between developing countries and developed countries in these measures. Also, there are often digital divides within countries, such as between urban centers and rural areas, or gender, ethnic or minority groups. These should be acknowledged and addressed by program evaluators.

2.5.3 National economic and social context

The economic and social context indicators that are most relevant to developing countries are those related to the UN Millennium Development Goals. Indicators are listed for each of the MDGs (see Annex 1). Other basic economic and social indicators and data are reported in the World Bank Development Report and the UNDP Human Development Report.

BOX 2.8. Examples of national education indicators

<table>
<thead>
<tr>
<th>General indicators</th>
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<tbody>
<tr>
<td>Test public expenditure on education</td>
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<tr>
<td>Test educational expenditure per student</td>
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<tr>
<td>Relative proportion of public and private investment in educational institutions</td>
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<tr>
<td>School enrollment rates at various levels</td>
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<tr>
<td>Instructural time</td>
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<tr>
<td>Class size and ratio of students to teaching staff</td>
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</table>

Specific to ICT for education

- Presence of a national ICT policy
- Presence of a master plan with a timeline
- National expenditure on ICT in education
- Ratio of students to computers
- Ratio of students to computer networks in schools
- ICT as a separate subject in the curriculum
- Total public expenditure on education
- Ratio of students to teachers in schools
- Number of schools incorporating ICT

Adapted from UNDP, and UNESCO.

BOX 2.9. National ICT indicators

<table>
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<tr>
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<td>Percent of school and government offices with access to the Internet</td>
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Adapted from ITU.

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Adapted from ITU.
2.6 COSTS AND OUTCOMES

The kinds of programs and projects described in this handbook may be expensive in upfront and ongoing costs and could well be competing for funding with many other projects—including educational ones that seek similar outcomes without using ICTs. Policymakers should thus compare the outcomes of a program with its costs so that they can make the best choices for public investments. There are two ways to do this: cost-benefit analysis and cost-effectiveness analysis\(^\text{15}\).

For a cost-benefit analysis, a common metric or indicator (money) is used to value the most significant costs and benefits for a particular project. This indicator allows for an analysis of a program or a comparison of several proposals, taking into account the time-value of money to determine the best return on the investment. The intent is to compute the monetary value of benefits and compare them to the monetary values of program costs or expenses. If a program does not achieve a minimum acceptable return of benefits to costs, then no funds should be invested. On the other hand, a cost-effectiveness analysis identifies and compares the costs of a project with some measurable outcome, without having to convert this outcome to a monetary value.

For either the cost-benefit or cost-effectiveness analysis, it is relatively easy to tackle the cost side of the equation. Fixed costs will be incurred irrespective of the size of a program: central buildings, facilities and equipment such as servers and radio/TV transmitters, central training and technical support, and infrastructure costs such as LANs, WANs, satellite connections and Internet Service Provision. Variable costs are per-user costs and depend on the number of users or participants in the program. These might include initial and recurring local facilities costs like computer labs, hardware costs, teaching materials, local connectivity and Internet usage, and local technical support. It is important to carry out a comprehensive analysis of all potential fixed and variable costs for a program, since often there will be not-so-obvious costs that might have serious cash flow implications as a program unfolds.

On the other side of the equation, it is often difficult to assign a monetary value to the outcomes of a project in the public sector because outcomes (such as improved test scores, increased school attendance, more competent teachers, and higher graduation rates) do not have a direct market value, as outcomes do in the private sector. Consequently, cost-benefit analysis may not be possible or appropriate. When it is used, alternative programs may be selected based on their highest net benefit, rather than the highest return on investment, since a very small project may have small benefits but even smaller costs, relative to a larger, more beneficial project.

Nonetheless, it is sometimes preferable in the public sector to use cost-effectiveness analysis, rather than cost-benefit analysis. The many measures and indicators of success described in this chapter show clearly in that in the complex world of ICT for education, the “intangible” benefits (that is, in non-monetary terms) may be the most crucial ones. Thus, cost-effectiveness must take into account the many non-fiscal dimensions of a project that cannot always be put in strictly program monetary terms. As with a cost-benefit analysis, planners figure the program cost elements in monetary terms; but effectiveness (of outcomes) may be measured in other ways, such as improved test scores or number of students graduated or reduced downstream costs due to increased school retention.

2.7 CONCLUSIONS AND IMPLICATIONS

Policymakers and evaluators can draw on a wide variety of indicators of inputs, outcomes context, and costs. Based on this review, we draw the following set of conclusions:

- Program evaluations should concentrate on measures of student and teacher learning. The learning measures that are likely to be most sensitive to ICT-supported programs are those that are custom-

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15 Stiglitz, 2000

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designed for the program. These customized assessments should include measures of learning that are likely to result from the systematic use of ICT.

- Evaluators need to document and measure baseline inputs to the program, such as the amount and kind of ICT used, teacher training levels, and pedagogical practices that are associated with the program.
- Evaluators need to acknowledge and describe the national educational, technological, social, and economic factors that enable and constrain what can be done with the program.
- Evaluators may also need to calculate the fixed, recurrent and variable costs of the program and compare these to the program’s benefits (monetary and non-monetary), as well as the costs and benefits of alternative educational approaches.
- Direct measures of M&E indicators are the most reliable sources of information. They also tend to be the most costly. Indirect measures, such self-report surveys, can be less expensive, but also less reliable. The reliability of these measures can be increased by obtaining information from multiple sources.
- Finally, the program can benefit from obtaining and distributing information on these measures throughout the program’s implementation, rather than just at the end. This information can be used to spot problems in the early stages and make adjustments that will increase the likelihood of success.

In this chapter, we have tried to describe the different types of indicators that may be used in M&E studies of ICT for education projects. It should be evident that there is no single recipe, but there are nonetheless quite a few guidelines. Based on these elements, the next step in the M&E process is to focus on how to implement an evaluation study, which is laid out in the following chapter.

KEY REFERENCES:


Endnotes

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3. DEVELOPING A MONITORING AND EVALUATION PLAN FOR ICT FOR EDUCATION

TINA JAMES AND JONATHAN MILLER

Executive Summary

This chapter provides an overview of the processes, tasks and outcomes that are needed to implement a successful M&E plan. It includes an assessment of results at the end as related to the original objectives set for the project—but only if you plan for it in advance. The M&E framework should be fully aligned with the program design or research methodology, drawing on both quantitative and qualitative data. Ongoing M&E then becomes a project output in its own right, with the added benefits of learning and feedback throughout the design, planning and implementation stages of a program.

3.1 INTRODUCTION

Monitoring and evaluation (M&E) allows ongoing learning and feedback throughout the design, planning and implementation stages of a program. It includes an assessment of results at the end as related to the original objectives set for the project—but only if you plan for it in advance. Program implementers sometimes regard M&E as an externally driven and imposed ‘policing’ action with little perceived value, while policy makers try to understand ‘what happened’ after project completion. Both of these are common occurrences with M&E in ICT for education (ICT4E) projects.

Fortunately, recent trends have been moving more towards a participative, learning approach with improved local ownership of M&E efforts, and greater collaboration between policy makers, implementers and learners. This requires that sound M&E frameworks and practices be put in place at the inception stage of an implementation program or research exercise, rather than as an afterthought once implementation is well underway. The M&E framework should be fully aligned with the program design or research methodology, drawing on both quantitative and qualitative data. Ongoing M&E then becomes a project output in its own right, with the added benefits of learning from past experience. The outputs from a well-designed M&E plan can in turn influence the future directions that an ICT in education program may take, and allow levels of flexibility and adaptability to changing circumstances.

This chapter describes a number of steps that are common to virtually every M&E plan for ICT4E projects. They include how to get started with the M&E plan, how to translate the overall vision for M&E into implementation, and how to disseminate the results. The important aspect of determining the costs and benefits of M&E is covered, and the chapter concludes with some key recommendations.

3.2 WHAT IS MONITORING AND EVALUATION?

There are important similarities and differences between these two distinct components of the M&E process:

The monitoring process looks at what is being done and how it is being done. It could involve continuous tracking of activities, review of the flow of services and activities provided by the program, compliance with
Monitoring and Evaluation of ICT in Education Projects

3.3 GETTING STARTED

a) Before you begin. There are a number of things to look at right up front—understanding where you are going is the only way to get there. Here we include defining the overall goals and objectives, understanding the context for the study, identifying the key players, and selecting from different approaches to carrying out M&E.

b) The overall goals and objectives. Goals are high-level statements that provide the overall (often longer-term and less tangible) context for M&E, while objectives are concrete statements describing what the M&E project is trying to achieve (often shorter term and precise). For instance, the goals of M&E in an ICT4E program might include broad confirmation that a new ICT curriculum is workable and acceptable to the majority of teachers who will be affected. The objectives of the M&E program might be to gather quantitative data from at least a hundred teachers at two different grade levels in twenty different schools over a period of three months.

c) The context. No project takes place in isolation—it is important to understand the influences of existing national and local policies and strategies, and the political and administrative structures that affect implementation. Any information that can be gathered prior to the start of M&E, such as baseline data, previous studies, reports, proposals and project plans, will provide a better basis for understanding what the project or program is setting out to achieve. It is important to give some thought to whether there are any risks associated with the successful implementation of the M&E. For example: Will key players (such as those described below) cooperate? Will there be difficulties in collecting data?

**BOX 3.1 Namibia: Large-scale Implementation of Computers in Schools**

Beginning in February 2000, SchoolNet Namibia set up computer laboratories in some 112 schools, launched an ISP and successfully connected the schools to it. It showed how this could be done in rural and disadvantaged areas where there were neither telephone lines nor connections to the power grid. Through mentoring and training, SchoolNet had become a test bed and demonstrator for technical solutions that challenged more widely used proprietary operating systems.

The formal SIDA evaluation report noted that, in terms of the original project objectives, the project had clearly succeeded in “installing basic (Internet connected) LANs in secondary schools”, although it was far away from the original objective of connecting 500 schools or the revised figure of 350. There was evidence indicating that some schools connected by SchoolNet were “...although it was far away from the original objective of connecting 500 schools or the revised figure of 350. There was evidence indicating that some schools connected by SchoolNet were “enhancing basic computer skills of learners and teachers.” SchoolNet was helping to “create a recruitment pool for IT technicians and professionals,” though not in the way envisaged in the original logic frame analysis. As for the development goal to “improve the preconditions for education and for the gathering of knowledge and participation in a democracy for the country’s youth through broadened horizons and a higher level of knowledge by using the possibilities of cheap and simple computation that ICT offers,” the report noted the rather vague phrasing and the lack of clearly defined indicators, which made it difficult to draw concrete conclusions. It also criticized the lack of quantitative data to monitor project performance and enable objective evaluation. The formal agreement had to rely on subjective commentary from users. The database for the progress and results of the various activities was incomplete and, when available, it was not easy to access and query. The SIDA evaluation report is a rich source of information and perspectives on shaping, monitoring and evaluating ICT projects. It highlights that large-scale project objectives are on shifting sands. What makes sense early may well change in positive or negative ways as schools, teachers and learners acquire new technologies and attempt to extract real value.

See www.schoolnet.na and www.sida.se.

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Monitoring and Evaluation of ICT in Education Projects

laws, regulations, guidelines, etc. Much of the information desirable to monitor a program is also valuable for the evaluation component.

Evaluation looks at performance against goals. This can and should take place while the program or research project is underway, and is concerned with evaluating how the intervention is meeting its performance goals.

The early aspect is called formative evaluation; it overlaps with monitoring to the extent that it uses the data gathered during monitoring that is specifically performance related. Near the end of the project, there should be an evaluation of how effective the program has been or whether the research project has met its original objectives. This is called summative evaluation.

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The Ministry of Education, Science and Technology of the Government of Kenya is putting plans in place to introduce ICT into Education to improve the quality of formal and non-formal education. A draft Options Paper was produced in June 2005 which addresses the requirement as spelled out in the Kenya Education Sector Support Program for 2005—2010. Included in the Options Paper are a number of proposed interventions—interactive radio instruction, ICT in schools and teacher training colleges, ICT infrastructure development, computer refurbishment, open and distance learning, community ICT learning centers, educational management information systems (EMIS) and e-curricula.

An integral part of the Options Paper is the inclusion of monitoring and evaluation so as part of the overall plan. The paper specifically addresses the need to develop appropriate indicators for measuring progress and impacts during implementation. Three key areas have been identified: (1) Infrastructure and Access; (2) Training and Usage and (3) Impacts. Data collection for (1) and (2) will be done nationally whereas impacts will most probably be carried out through the use of in-depth case studies. The paper also recommends that data collection be disaggregated by gender and communities.

The types of indicators that are being considered are:
- a) Infrastructure: number of types of hardware, software, connection speeds, etc.
- b) Training & Usage: type of training—technical support, ICT literacy, usage by learner, instructor, student, teacher and others.
- c) Impacts: e.g. skill and knowledge improvements—ICT literacy, technical expertise, subject area expertise, attitudes and value changes.

Adapted from AED.

### 3.4 DESIGNING THE M&E PLAN

Once there is a clear picture of the context and key players, the overall goals and objectives of the M&E plan are defined, and the broad approach is selected (or dictated), it is time to get down to the detailed design of the implementation plan. For one recent national planning model for M&E, see Box 3.2.

**Box 3.2. Kenya: Integrating Monitoring and Evaluation into a National ICT in Education Plan**

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Adapted from AED.
In this section we focus on different methods of study, selecting indicators of performance and how to gather that information. Guidelines are provided to help ensure objective interpretation of the results and the drawing of credible conclusions.

a) Choosing the Method of Study. There remains a severe lack of good qualitative and quantitative data on the impacts of ICT on education. It has still not been possible, for instance, to prove the benefits of including ICT in formal primary and secondary education settings. There has been general agreement though that ICT has benefited aspects such as teacher education, access to content for both teachers and learners, and development of vocational skills and knowledge. One of the reasons for this lack of conclusive evidence is the difficulty of carrying out scientific studies in the messy world of schools, teachers, learners and subjects. The interplay between so many variables that have to be controlled or tested, the social and political realities of education systems, the limited availability of program and research funding, and the shortage of research capacity in developing countries makes the conduct of rigorous “controlled experiments” difficult if not impossible.

What planners and researchers can do is carry out “design experiments”, where they craft and implement a new design for a particular learning environment. For instance, a teacher might work closely with a research team to incorporate computer simulations into the learning process, jointly design a series of exercises to introduce novel procedures, and carefully monitor and assess the impact of the innovation on the learners, the teacher and the interaction between them.4

In larger scale studies, sample surveys can provide descriptive information on the status of learning processes, perceptions, or attitudes. They may also directly measure skills levels (see Chapter 2). Sample surveys rely primarily on quantitative techniques and are designed using carefully constructed rules for sampling, data collection, and analysis.

At the other end of the scale lie case studies: intensive, qualitative studies of specific situations in a classroom, school, school district, or schools in a country or region. Researchers have used the case study method for many years to examine contemporary real-life situations issues, and problems.

b) Selecting M&E Indicators. Underpinning all M&E activities is the need to determine what it is that is being measured, and for what purpose. The identification, selection and prioritization (in some cases) of both quantitative and qualitative indicators are therefore critical before M&E can be undertaken. The need for specific indicators may also evolve and change over time, as circumstances change. Chapter 2 of this volume has provided a broad overview of core indicators and suggested that their selection may be based on inputs, outcomes, national contexts and costs. On a practical planning level, the context and process in which indicators are selected need to be taken into consideration. A variety of questions therefore need to be asked at the start of any M&E intervention, as shown in Box 3.3.

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4 Collins, 1999

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## BOX 3.4. Types of Data Collection and Their Appropriate Use

<table>
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<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Questionnaires</td>
<td>A predetermined list of questions which can consist of structured and / or open-ended questions. Can be printed or electronic versions.</td>
<td>Large sample size. Geographically dispersed samples. Used if a sample has small access and is in conflict with online surveys.</td>
<td>Can complete many in a short time. Relatively cheap if Internet is available. Can complete information in a short time.</td>
<td>Generally a low return rate. Long data in terms of questionnaire. Unstable mailing systems. ICT access could be limited.</td>
</tr>
<tr>
<td>Face-to-face interviews</td>
<td>Generally conducted face-to-face generally one-on-one. Generally leads to a more open-ended format to allow for flow of ideas from key stakeholders.</td>
<td>Small sample size. With more in-depth information is required. With key stakeholders unlikely to complete a questionnaire.</td>
<td>Generally a wealth of additional information that can inform more structured approaches e.g. audits, checklists, questionnaires. Best if the group is diverse in background, power positions, education levels, etc. Requires good record-keeping.</td>
<td>Trimmers return. Analysis of the responses may be more complex. May require support from experienced interviewers within the evaluation.</td>
</tr>
<tr>
<td>Telephonic interviews</td>
<td>Interviews conducted over the telephone. May include conferences calling with more than one person at a time.</td>
<td>Geographically dispersed samples. ICTs readily available and affordable.</td>
<td>Best for the time where existing travel may be involved. Can work well with more experienced interviewers.</td>
<td>Telephonic interviews can be expensive / difficult when intermediaries exist. High and low available. Call-backing can always be done.</td>
</tr>
<tr>
<td>Workshops / Focus groups</td>
<td>Generally facilitated discussions with several stakeholders. A separate recorder / observer is ideal. Generally a small number of broad topics.</td>
<td>Good facilitators are required. Particularly if the group can be diverse in background, power positions, education levels, etc. Requires good record-keeping.</td>
<td>A well-facilitated group can provide rich inputs. Underlying differences, even hostilities and mistrust, need to be understood and could be disruptive without good facilitation.</td>
<td>Can be unreliable due to subjective analysis.</td>
</tr>
<tr>
<td>Content analysis of materials</td>
<td>Analysis of key program documentation - video, audio, and/or hardcopy.</td>
<td>General topic includes curriculum materials, policies, strategies, teaching resources, lesson plans, project and program plans, progress reports.</td>
<td>Can provide useful background for any M&amp;E activities. Can be used for self-assessment, audit purposes, classroom observations, online surveys.</td>
<td>Useful to determine the status of ICT availability. Useful to assess ICT infrastructural needs.</td>
</tr>
<tr>
<td>Infrastructure audits</td>
<td>Assess the levels of ICT infrastructure, access and availability - hardware, software and telecommunications.</td>
<td>Useful to determine the status of ICT availability.</td>
<td>Can be analyzed quickly. Can be relatively superficial, and reflect the evaluator’s biases.</td>
<td>Generally a facilitated discussion with several stakeholders. A separate record-keeper / observer is ideal. Generally a small number of focused topics.</td>
</tr>
<tr>
<td>Checklists</td>
<td>A pre-prepared list of items which can be used to assess numerous activities rapidly. Requires completion of ‘boxes’—hardcopy / electronic.</td>
<td>Can be used for self-assessment, audit purposes, classroom observations, online surveys.</td>
<td>Useful when quick responses are required and / or when the evaluator is reluctant to spend time writing. Can be relatively superficial, and reflect the evaluator’s biases.</td>
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<td>Software analysis</td>
<td>Analysis of the content and functionality of education software</td>
<td>To assess the appropriateness of software for educational purposes, e.g., teacher education, school administration, etc.</td>
<td>Could be a basic requirement for M&amp;E involving educational software</td>
<td>Could be unreliable due to subjective analysis</td>
</tr>
<tr>
<td>Self-assessment reports</td>
<td>Widely used as an assessment tool in M&amp;E in education</td>
<td>Assess self-perceived levels of proficiency, attitudes and perceptions, etc.</td>
<td>Can be applied to large numbers of learners and teachers</td>
<td>Can result in bias due to self-reporting, time intensive to analyze</td>
</tr>
<tr>
<td>Work sample analysis</td>
<td>Analysis of work produced by learners, teachers, administrators</td>
<td>Tests productivity and proficiency levels, e.g., ICT literacy skills, presentation skills, administrative skills</td>
<td>Can provide a quick snapshot of skill levels</td>
<td>Could be relatively superficial and more appropriate for testing low-level skills, time intensive</td>
</tr>
<tr>
<td>Activity Logs</td>
<td>Records are kept by learners/teachers/administrators of specific activities</td>
<td>Monitoring of computer access, levels of learning achieved (self-assessment)</td>
<td>A useful indicator of levels of activity and productivity</td>
<td>Self-reporting can be biased</td>
</tr>
<tr>
<td>Classroom observations</td>
<td>Assess teaching</td>
<td>Assessment of classroom layouts, instructional practices, learner-teacher interactions, learner behavior, integration of ICTs, etc.</td>
<td>Allows an hands-on assessment of classroom practices</td>
<td>Time intensive, inherent bias in that learner-teacher behavior may be ‘rehearsed’ for the sake of a good result from the observation</td>
</tr>
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3.5 IMPLEMENTING THE M&E PLAN

a) Collecting the data: There are numerous methods of collecting data. The choices that are made will largely depend on: (i) the availability of budget; (ii) the appropriateness for the objectives to be achieved through M&E; (iii) the availability of skills to carry out M&E; and (iv) the geographic distribution of the places where data is to be collected. Some choices will be dictated by the contextual environment in which the study is taking place. Box 3.4 provides a summary of various data collection tools that could be used, along with comments about each.

b) Analyzing and interpreting the data and developing credible conclusions: Built into an M&E plan should be a method of gathering data that allows rigorous analysis leading to objective and unbiased conclusions. This is particularly important to ensure that the results of M&E will be accepted and regarded as credible by key players and decision makers. Typically this would involve selecting a random sample of units of interest, such as schools, teachers, or schools. This means that if, for instance, you are creating a random sample of learners, every learner should have an equal chance of being selected for evaluation. Pulling names from a hat would be an acceptable way of ensuring a random sample in this case. In other cases, computer-generated random numbers could be used. If comparison is across grades, then a so-called “stratified” random sample would be appropriate—making sure equal numbers are chosen from each grade level for instance.

If at all possible, comparisons of outcomes should be made with a control group matched in defined ways to the experimental group. For instance, in the Khanya evaluation (see Box 3.5), a random sample of experimental schools was selected and compared with a random sample of schools with similar demographic characteristics, but outside the Khanya program.

To facilitate data analysis, the data should, as much as possible, be quantitative (or quantitatively from case or qualitative approaches), and allow the application of well-accepted statistical techniques. The selection of appropriate ICT provisioning, teacher effectiveness in the use of technology for curriculum delivery and learner performance. Regular assessment reports are issued.

Of special interest is the recent and careful statistical analysis of the relationship between use of the ICT-supported Master Maths program and mathematics scores on standardized tests. Two kinds of post facto analyses were done by the evaluation team—comparisons between a random sample of “experimental” schools paired with “control” schools, and a longitudinal (time) analysis of mathematics scores for the three successive graduating classes in a random sample of experimental schools. In both analyses, controlling for several other variables, there is evidence that the mathematics scores for learners on the ICT-supported maths programs were significantly better. The evaluation offers a good example of a significant attempt to carry out an objective analysis of the impact of ICT on specific learning outcomes, difficult to design, implement and evaluate.

Adapted from Khanya*

3.5 IMPLEMENTING THE M&E PLAN

a) Collecting the data: There are numerous methods of collecting data. The choices that are made will largely depend on: (i) the availability of budget; (ii) the appropriateness for the objectives to be achieved through M&E; (iii) the availability of skills to carry out M&E; and (iv) the geographic distribution of the places where data is to be collected. Some choices will be dictated by the contextual environment in which the study is taking place. Box 3.4 provides a summary of various data collection tools that could be used, along with comments about each.

b) Analyzing and interpreting the data and developing credible conclusions: Built into an M&E plan should be a method of gathering data that allows rigorous analysis leading to objective and unbiased conclusions. This is particularly important to ensure that the results of M&E will be accepted and regarded as credible by key players and decision makers. Typically this would involve selecting a random sample of units of interest, such as schools, teachers, or schools. This means that if, for instance, you are creating a random sample of learners, every learner should have an equal chance of being selected for evaluation. Pulling names from a hat would be an acceptable way of ensuring a random sample in this case. In other cases, computer-generated random numbers could be used. If comparison is across grades, then a so-called “stratified” random sample would be appropriate—making sure equal numbers are chosen from each grade level for instance.

If at all possible, comparisons of outcomes should be made with a control group matched in defined ways to the experimental group. For instance, in the Khanya evaluation (see Box 3.5), a random sample of experimental schools was selected and compared with a random sample of schools with similar demographic characteristics, but outside the Khanya program.

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Adapted from Khanya*

* See: http://www.khanya.co.za

In the Khanya project, the Provincial Education Department in the Western Cape Province of South Africa has been rolling out computers and computer-based learning from the delivery of curricula throughout the province. Since 2000, Khanya has deployed some 12,000 computers across nearly 600 schools out of the 1500 in the province. About 9,000 teachers and 300,000 learners are being taught by the project so far. While deployment of computers and software, creation of IAP’s and connections to the Internet are critical components, the core objective of Khanya is to use ICT in the delivery of curriculum—to teach mathematics, science and other learning areas in secondary schools, and technology in primary schools. The intention is to empower teachers and learners to develop their own material, gain planning and organizational skills through lesson planning, enhance the delivery of curricula and to put learners in township and rural schools in touch with the rest of the world through the Internet and email.

About 50 staff run the Khanya project and engage in continuous internal monitoring and evaluation. In addition, since 2002 there has been a regular process of external evaluation by a team from the University of Cape Town in South Africa. The evaluation addresses appropriate ICT provisioning, teacher effectiveness in the use of technology for curriculum delivery and learner performance. Regular assessment reports are issued.

Of special interest is the recent and careful statistical analysis of the relationship between use of the ICT-supported Master Maths program and mathematics scores on standardized tests. Two kinds of post facto analyses were done by the evaluation team—comparisons between a random sample of “experimental” schools paired with “control” schools, and a longitudinal (time) analysis of mathematics scores for the three successive graduating classes in a random sample of experimental schools. In both analyses, controlling for several other variables, there is evidence that the mathematics scores for learners on the ICT-supported maths programs were significantly better. The evaluation offers a good example of a significant attempt to carry out an objective analysis of the impact of ICT on specific learning outcomes, difficult to design, implement and evaluate.

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indicators and sample sizes in the design of the M&E plan must take into account whether the data will be normally distributed (i.e., following the well-known bell-shaped curve), what kinds of statistical techniques will be applied, and the desired effect size (e.g., the percentage improvement in test scores). There are several techniques of data analysis that can be applied under these conditions, such as analysis of variance, covariance analysis, multifactorial statistical analysis, multiple regression techniques including multi-level regression, and structural equation modeling. Even if the nature of the data is not expected to lend itself to such tests, there are other tests such as cluster analysis, analysis of ranks, etc., which can be applied. It is vital that the design of the intervention take into account in advance how the data will be collected and analysed. Researchers sometimes end up with large quantities of data that they are not able to analyze in an effective way.

3.6 DISSEMINATING THE RESULTS OF M&E

When an M&E plan is formulated, it is important to consider how to manage interactions with the people who will be involved in the process. These people could be decision makers, teachers, government officials or learners, and each will require some form of interaction with the M&E team. In particular, there may be formal steering committees, user groups and program committees to consider. A number of factors will need consideration:

a) The identification of the key stakeholders and stakeholder committees who need to be involved, either directly or indirectly.

b) The levels of participation that will be required from different players. For example, how often will key stakeholders meet? And will this be through group meetings, personal discussions, through information sharing in presentations or through the circulation of the final reports?

c) The formality of participation. Are formal meetings with a minute-taker required and, if so, how often? Should such meetings be at regular intervals or to mark milestone events in the project (or both)?

d) The level of transparency about the results of the M&E, as well as during the M&E process. For example, if there are very negative criticisms that emerge during the M&E, with whom will the outcomes be discussed?

e) The dissemination of the M&E results. A dissemination strategy is required that spells out exactly how to deal with the outcomes of the M&E activity, how widely the results will be circulated and to whom. This is particularly important if M&E is to be regarded as a potential means of increasing knowledge and improving the outcomes of existing and future projects. A matrix such as the one below (see Box 3.6), which spells out how to communicate with different stakeholders, may be helpful.

| BOX 3.6 Matrix outlining intended dissemination approaches to various stakeholders |
|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
|                  | Personal meetings | Presentations | Small Discussion Groups | Website | Summary Report | Full report | Email lists |                  |
| All Stakeholders | ✔               | ✔              | ✔                       | ✔     | ✔              | ✔                | ✔              |                  |
| Teachers         | ✔               | ✔              | ✔                       | ✔     | ✔              | ✔                | ✔              |                  |
| Ministry of Education | ✔             | ✔              | ✔                       | ✔     | ✔              | ✔                | ✔              |                  |
| Parents          | ✔               | ✔              | ✔                       | ✔     | ✔              | ✔                | ✔              |                  |
| Etc.             | ✔               | ✔              | ✔                       | ✔     | ✔              | ✔                | ✔              |                  |

7 Kremer, 2003

8 In some cases scientific rigour may have to be compromised, and convenience samples may be chosen in light of local conditions e.g., if the project budget allows only one school to be part of an experiment, while such convenience samples may mean questions to the scientific validity of the study, resulting bias will always help to provide a more persuasive set of conclusions.

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c) The formality of participation. Are formal meetings with a minute-taker required and, if so, how often? Should such meetings be at regular intervals or to mark milestone events in the project (or both)?

d) The level of transparency about the results of the M&E, as well as during the M&E process. For example, if there are very negative criticisms that emerge during the M&E, with whom will the outcomes be discussed?

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| Etc.             | ✔               | ✔              | ✔                       | ✔     | ✔              | ✔                | ✔              |                  |

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3.7 ANALYZING THE COSTS (AND BENEFITS) OF IMPLEMENTING AN M&E STRATEGY

The fiscal dimension of ICTs in education development is often seen in terms of capital investments, ongoing maintenance costs, regular costs of connectivity, and training costs. Some of these costs may be difficult to estimate in advance, including the cost of doing M&E. The scarcity of funding for any type of development initiative means, however, that its potential cost-effectiveness will be considered as a critical factor. When ICTs are involved in any initiative, the perception that they are costly further amplifies the requirement for clear budgeting for M&E as a component of the costs of ‘doing business’ in ICT4E. In countries that are at risk of failing to reach Millennium Development Goal (MDG) targets, the issue of cost is especially acute. Considering costs in M&E is not simple, as there are many and varied direct and indirect costs depending on the level of data gathering and analysis required.10

The Costs of an M&E strategy Each of the elements of an M&E plan will add additional costs to the overall program or project, and these must be dealt with up front, including those shown in Box 3.7. Exactly what the costs will be depends on the nature of the intervention, whether local or international personnel are used, and so forth. For instance, small stand-alone projects such as technology implementations (e.g. single school computer labs) that focus on tangible outputs and outcomes, may require little data gathering other than data generated by the project itself. M&E of large-scale multinational multi-year programmes based on implementation of national policies may call for substantial investments in time and effort on the part of many professional evaluators, and greater levels of inputs of other kinds.

In its survey of well-known methods of monitoring and evaluation, the World Bank offers rough cost data for each method in terms of low, medium, or high investment, and suggests that each calculation depends on a whole host of factors, but with a cost factor that matches the usually large size of Bank loans and grants.10 We take the position that an M&E budget should not divert program resources to the extent that “returns on investment” (ROI), only certain benefits are even more difficult to state in financial terms. Some benefits do not lend themselves to easy quantification. For example, how can one measure the fiscal benefit of knowing that one type of implementation is better than another? We might know which implementation strategy to pick the next time, but we might not easily know whether the level of investment in M&E was too much or too little or just right. As with many “returns on investment” (ROI), only certain kinds of benefit lend themselves to measurement of this sort. The non-tangible benefits, such as the

BOX 3.7 Some principal costs of M&E, in measurable fiscal terms

- Technical assistance to determine and advise on the most effective M&E initiatives for the particular intervention
- Technical assistance to carry out the recommended ongoing monitoring and formative evaluation, including the concluding summative evaluation. This may involve contracting M&E of larger scale
- Defining performance goals related to activities, outputs, outcomes and impacts for formative and summative evaluation
- Designing proper experimental or survey procedures, sample size and selection schemes, control group, etc.
- Where needed, implementing increased sample sizes, numbers of enumerators, additional levels of treatment etc. to ensure a given level of accuracy in statistical analysis and providing conclusive results for a chosen effect size etc.
- Proper monitoring of the tasks being carried out to implement the project and deliver the identified outputs (information, data gathering, analysis and reporting)
- Formative and summative evaluations of quantity and quality of outputs and the timing of their delivery
- Undertaking statistical analysis and interpretation of the data emerging from monitoring and evaluation
- Implementing management information systems (MIS) and procedures where recommended for more effective M&E

10 World Bank, 2004

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10 World Bank, 2004
Policy maker's satisfaction, or ICT interventions not to make the next time around, are important—or even crucial—but may be difficult to put in monetary terms.

In sum, the benefits of engaging in M&E may be seen in the increased confidence of donors or sponsors to invest in a particular ICT for education initiative. In the policy domain, M&E results can strengthen the case for a budgetary shift in a particular direction or not; and in the social arena, M&E results can persuade teachers and principals that it is safe and beneficial to adopt ICT-related methods.

3.8 CONCLUSIONS

"Not everything that can be counted counts, and not everything that counts can be counted." —Attributed to Albert Einstein

This chapter has tried to provide an overview of the processes, tasks and outcomes that are needed to implement a successful M&E plan. In conclusion, we provide a list of pointers specific to the M&E implementation plan that will assist in focusing attention on the key elements that should not be ignored.

The M&E process should be an integral component of any planned ICT in Education program and should be factored into planning before a project starts. This means that local ownership and accountability are crucial if learning is to be gained and built on for future activities. Disseminating the insights gained from M&E should form part of the learning process.

Appropriate, realistic and measurable indicators should be selected (and not too many) to monitor outputs and outcomes. The data collected should be relevant and there should be a clear understanding of what will be done with it once it has been collected.

Monitoring activities should be clearly distinguished from the formative and summative evaluations of performance criteria—they support different functions.

All major stakeholders should be identified and involved in making M&E decisions. This will avoid possible problems with buy-in and commitment later in the process.

Adequate thought must be given to who the key target groups will be in implementation—and what expected outcomes are desired for each group.

Finally, M&E costs should not be underestimated. If the outcomes of M&E are seen as useful and add to the future improvement of implementation, the allocated funds will be well-spent and are likely to provide major benefits in terms of better outcomes and impacts. We suggest that approximately 5 to 10 percent of total project costs be set aside as a reasonable target for M&E programming.

KEY REFERENCES


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KEY REFERENCES


4. CAPACITY BUILDING AND MANAGEMENT IN ICT FOR EDUCATION

TIM UNWIN

Executive Summary

- Good management is essential for the successful implementation of monitoring and evaluation activities in the field of ICT4E.
- Monitoring and evaluation activities themselves also have a significant influence on educational management and enhanced capacity building in poor countries.

The relationships between ‘monitoring and evaluation’ and ‘capacity building and management’ are crucial for the successful implementation of technology-enhanced learning programs in three specific ways. First, it is essential for monitoring and evaluation activities to be well-managed and led so that they can be used effectively for the improvement of technology-enhanced educational programs. Those involved in monitoring and evaluation need to be well-trained so that they can deliver sensitive and appropriate recommendations. Second, monitoring and evaluation have a direct impact on capacity building and management. Used effectively, monitoring and evaluation provide a key mechanism to enable those involved in both formal and informal educational systems to improve their practices. Third, capacity building and management activities themselves need to be monitored, so that their role in delivering technology enhanced learning can be better understood and enhanced.

Despite this importance, policy makers and practitioners have rarely sufficiently considered the complexities associated with the interactions between these core elements of e-learning strategies. Academic studies have been little better. Cox et al. in their comprehensive review of the research literature on ICT and attainment thus only mention ‘management’ twice, and fail to mention capacity building at all! This chapter therefore provides a practical overview of the key aspects of capacity building and management that should be taken into consideration in the monitoring and evaluation aspects of any ICT for education activities. Above all, this chapter advocates a virtuous cycle of quality enhancement, through which all those involved in technology-enhanced educational activities can work to improve their organizations and activities by being self-critical and engaging regularly in monitoring and evaluation.

4.1 KEY ISSUES

4.1.1 The central role of capacity building and management

The introduction of ICTs into learning environments, be they in schools, universities, adult learning centers or the workplace, requires inspirational leadership and skilful change management expertise. This is not just a matter of head teachers or Chief Executive Officers (CEOs) being committed to the process, but rather reflects a need for everyone involved to understand the implications of the changes being made, and to feel able to contribute to the processes. Capacity building and management go hand in hand; everyone needs to...
be trained appropriately, and the processes require careful management. In particular, it is important that those charged with undertaking formal monitoring and evaluation activities as proposed in this handbook are able to develop the appropriate skills to deliver these programs appropriately and effectively.

4.1.2 Understanding the role of ICT

Appropriate management skills are insufficient by themselves to deliver effective e-learning programs. It is essential for everyone involved to understand the true potential of ICT to transform learning experiences. Far too often, computers have been put into schools with insufficient attention paid to the ways in which teachers will use them. One of the fundamental lessons to be learnt from European, North American and Australian experiences over the last 20 years has been that those responsible for helping people learn must be confident in the appropriate use of new technologies if the process is to be successful. Introducing new technologies into places of learning should involve a fundamental shift whereby the role of teachers becomes less didactic and more that of facilitating individual learning processes.3

4.1.3 The involvement of all

For measuring and evaluation to be effective, all participants in the learning process need to be involved. Measuring the impact of change can be seen by teachers as being very threatening, and it often alters the relationships between them and learners. It is therefore critically important that monitoring and evaluation are seen as a shared activity in which everyone learns how they can achieve better and more through the introduction of new technologies. It is often, for example, the case that pupils adapt to the use of new technologies more swiftly than teachers, and teachers need to be open to the possibility of learning new skills from their pupils.

4.1.4 Measuring the impact on what?

The use of new technologies in learning has far more fundamental influences on people’s lives than can be measured simply in terms of traditionally defined educational attainment targets.3 It is therefore difficult to design comprehensive ‘measurement’ procedures to evaluate the ‘effectiveness’ of such initiatives. This is a point that has been stressed throughout this handbook, and it is therefore very important that managers involved in such programs think carefully about the most appropriate and cost-effective procedures that should be adopted in their specific contexts. Moreover, even on the educational front, changes in performance levels in schools resulting from the use of ICTs might simply reflect the fact that pupils and teachers feel valued from the emphasis being placed on education through such programs rather than any actual changes in the way that people learn. It is fundamentally important, therefore, that managers identify exactly what it is that they want to measure in any such program, and also that they are open to considering a far wider diversity of influences than they might envisage simply from an ‘educational’ perspective.

4.2 THE CONTEXT AND IMPORTANCE OF CAPACITY BUILDING AND MANAGEMENT

4.2.1 Defining capacity building

What do we mean by capacity building? Different organizations adopt varied interpretations of ‘capacity building’, but ever since the Agenda 21 plan of action following the United Nations Conference on Environment and Development in 1992 the concept has gained increasing acceptance as being of fundamental importance to the delivery of ‘development’ objectives. Significantly, the Agenda 21 definition3

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only notes that ‘capacity building encompasses the country’s human, scientific, technological, organizational, institutional and resource capabilities’, but also that one of its fundamental goals is ‘to enhance the ability to evaluate and address the crucial questions related to policy choices and modes of implementation’.4 At the heart of discussions about capacity building is therefore the notion of its role in measuring and evaluating.

This theme has been central to the work of organizations such as the International Institute for Communication and Development9 in the Netherlands for the German Internationale Weiterbildung und Entwicklung GmbH, both of which have developed particular expertise at the interface between capacity building, ICT and evaluation.

4.2.2 The key participants

All too often broad definitions of capacity building tend to get reduced in practice to mean enhancing the skills of a particular cadre of people, and in education systems this usually means the teachers and administrators. However, if successful change management programs involving new technologies are to be introduced, it is of critical importance that all of the key participants are involved. Different cultures vary in their approach to education, and this handbook therefore recommends that a variety of groups of stakeholders should be involved in the design and implementation of monitoring and evaluation studies (see box 4.1):

4.2.3 Sharing expertise and understanding: a dynamic of continued enhancement

One assumption behind the inclusion of such a wide range of stakeholders in the conceptualisation of monitoring and evaluation processes, is that it takes the significance of education far beyond simply the school, college or university. It is about measuring the fundamental impacts of learning across many aspects of people’s lives. For this to be effective it is important that all those involved in monitoring and evaluation seek to adopt a collaborative attitude in developing shared expertise and understanding. The introduction of ICT into education is not a one-off process, but is instead the setting in motion of an entirely different mode of learning, one in which those involved seek to put in place a continued dynamic of enhancement. Striving for excellence, pushing the barriers back beyond traditionally accepted norms, lies at the heart of what monitoring and evaluation is about. If we were not interested in enhancing learning, making it more readily available to people from different backgrounds and with a range of abilities and disabilities, there would be little point in seeking to measure the effects of changes in educational methods, systems

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All too often broad definitions of capacity building tend to get reduced in practice to mean enhancing the skills of a particular cadre of people, and in education systems this usually means the teachers and administrators. However, if successful change management programs involving new technologies are to be introduced, it is of critical importance that all of the key participants are involved. Different cultures vary in their approach to education, and this handbook therefore recommends that a variety of groups of stakeholders should be involved in the design and implementation of monitoring and evaluation studies (see box 4.1):

4.2.3 Sharing expertise and understanding: a dynamic of continued enhancement

One assumption behind the inclusion of such a wide range of stakeholders in the conceptualisation of monitoring and evaluation processes, is that it takes the significance of education far beyond simply the school, college or university. It is about measuring the fundamental impacts of learning across many aspects of people’s lives. For this to be effective it is important that all those involved in monitoring and evaluation seek to adopt a collaborative attitude in developing shared expertise and understanding. The introduction of ICT into education is not a one-off process, but is instead the setting in motion of an entirely different mode of learning, one in which those involved seek to put in place a continued dynamic of enhancement. Striving for excellence, pushing the barriers back beyond traditionally accepted norms, lies at the heart of what monitoring and evaluation is about. If we were not interested in enhancing learning, making it more readily available to people from different backgrounds and with a range of abilities and disabilities, there would be little point in seeking to measure the effects of changes in educational methods, systems
and content. All those involved in measuring these effects must therefore seek to work together supportively and creatively in designing systems that enable the lessons learnt to be introduced swiftly and efficiently back into the learning environment, so that good practices can be shared more widely and learners consequently benefit more effectively from the monitoring process. In effect, we need to create a virtuous cycle of learning enhancement, where everyone is able to benefit from being involved in the monitoring processes.

4.2.4 Practicalities of professional development and training

From the previous section, it should be evident that strong leadership and the committed involvement of professionals are required for any systemic change, large or small. One major limitation for change in ICT and education is that many of those involved in helping people to learn in both formal and non-formal contexts have little or no skills in the appropriate use of new technologies. This is particularly so in poorer countries, and most notably in Africa. Furthermore, there have to date been rather few effective and sustainable schemes designed to enhance ICT4E literacy among teachers. To be sure, there are numerous projects that have sought to provide teachers with ICT skills, but many of these have been developed externally, often in the private sector, to develop skills that are relevant primarily in office environments. These are not necessarily those skills of most relevance in the classroom.

Knowing how a set of blended learning solutions, involving text, sound, imagery, touch and even taste and smell, can contribute to someone’s learning is of much more value than simply giving teachers an ability to use word processing or database management skills (Unwin, 2005)! Tactile keyboards, for example, bring the Internet to life for blind people; audio cassettes transform learning for those who have difficulty seeing; the visual use of sign language opens up communication for the deaf and those with hearing disabilities. There is, therefore, a profound need to develop systems and capacities that enable policy makers, administrators, teachers, and tutors to engage in professional staff training and development as an ongoing process within programs and to link staff development more closely with service improvement and evaluation/monitoring. Teachers and administrators must also have more opportunities to understand and learn from local problems and to invent local solutions. Increasing the proportion of well-trained ICT-literate teachers and/or full-time ICT instructors is an essential element of enhanced human capacity development.

In recent years China has initiated several major ICT-supported programs to enhance teacher training in its poorer Western provinces. These include the EU-China Gansu Basic Education Project,12 the UNDP and DFID supported program in Gansu, Sichuan and Yunnan,13 and the Asian Development Bank’s program in Hunan. Monitoring and evaluation are key components of these initiatives, as indicated in Box 4.2 below.

4.2.5 Building the capacity of evaluators

In addition to service providers, there is also a need for the building of human capacity in the monitoring and evaluation environment. Many of those involved in monitoring and evaluation, particularly in poor countries, have little experience of such work, and it is crucial that simple but effective schemes are developed to enable them to contribute to, and benefit from, such activities. Chapters 2, 3 and 6 of this handbook provide ready-to-use guidelines for such users, but the principles and examples of good practice outlined below should also help to build up familiarity with the concepts and approaches involved. This may initially require the involvement of external people, but it is essential that all those involved in formal monitoring and evaluation procedures should be trained effectively in their management and implementation. It would therefore be highly desirable for specialist centers of excellence in such processes to be developed at a national or regional level.

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4.2.6 The funding of evaluation

This chapter emphasizes the importance of a continual cycle of educational enhancement in which monitoring and evaluation play a dialectic role in capacity building and improved educational management. These should not be seen as separate entities, but rather as intimate partners in leading to improved systems of formal education and lifelong informal learning. However, the practical reality in most educational systems is that monitoring and evaluation, alongside measuring performance against targets, are frequently treated as separate and distinct activities, often undertaken by external reviewers or evaluators.

In many African countries, where over 90 percent of Ministry of Education budgets are spent on teachers’ salaries, governments and donors frequently see such external monitoring and evaluation as being less important than the actual delivery of education on the ground. This suggests that involving all participants in the education system in ongoing monitoring and evaluation as an integral part of their jobs would bring significant benefits. It will be particularly important to integrate detailed monitoring and evaluation processes in the strategies being developed in the countries participating in the Fast Track Initiative. Of these, several countries such as Ethiopia, Ghana, Mozambique and Vietnam, also have ambitious plans to use ICT in transforming their education sectors, and it is therefore all the more important that the additional funding available is used in part to develop and implement procedures as recommended in this handbook.

4.3 GOOD PRACTICES IN CAPACITY BUILDING AND MANAGEMENT

Much can be learnt from past experiences in incorporating effective monitoring and evaluation into ICT for education initiatives. Two case studies have been chosen, each from different continents and each reflecting very different aims and objectives, to highlight some of the themes and principles addressed in this chapter. Although Singapore and Chile are far from poor, as many of the countries embarking on technology development and capacity building have ambitious plans to use ICT in transforming their education sectors, and it is therefore all the more important that the additional funding available is used in part to develop and implement procedures as recommended in this handbook.

BOX 4.2 China: Chuan Xin Xie Zou Lao Lao (Walking the old road but just wearing new shoes): A Focus on Teacher Capacity Building

Since 1990, the People's Republic of China has made impressive progress toward achieving universal compulsory education. In addition, China has attached considerable importance to improving education via the use of information and communication technologies (ICT). One important recent project, with the assistance of the Asian Development Bank, the government has focused on the key areas of teacher quality and teacher training using ICT.

The project is located in Fenghuang County in Hunan province, a high poverty area where the government has already opted for large-scale hardware procurement. However, China determined that increased hardware infrastructure in schools would not be effective without appropriate professional development and sustained support for teaching practice. Thus, there was a worry that simple infrastructural improvements would amount to “walking the old road but just wearing new shoes.” That is, new multimedia classrooms would merely be used as another (and more expensive) blackboard for teacher lectures.

The China-technical assistance project places particular emphasis on soft components—i.e., educational content and materials, training of teachers to use new ICT tools for innovative teaching, peer support networks, and monitoring and evaluation—in addition to new ICT facilities and capacity. Professional development and capacity building has been built into the project design, including: (1) Engaging local teachers of English and Science in grades 7-8 with skills and tools to adopt new pedagogies of student-centered instruction (SCI)—particularly inquiry-based and collaborative learning—in their pupil creativity, reflective knowledge mastery, and problem-solving ability, and (2) Building effective networking mechanisms. This will include teacher peer networks (e.g., sharing of lesson plans and more broadly acting as “communities of practice” to spur peer-to-peer improvement); support from local teachers and local educational officials, and an enhanced role of township-level host schools in supporting village-level primary schools.

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4.3.1 Singapore

Management priorities were central to Singapore’s Masterplan for IT in Education (MPITE; Box 4.3), with the intention being to use IT to ‘promote greater efficiency in administration and communication, thereby supporting more effective educational management’.26 Moreover, one of the four key elements of the plan specifically addressed human resource development through training teachers in the purposeful use of IT in teaching, equipping them with core skills in teaching with IT, and involving partners from industry and institutions of higher learning in schools. Between 1997 and 2000, most teachers in primary and secondary schools completed 8 to 10 core modules over 30 to 50 training hours, covering topics such as involving IT in pupil project work, appropriate teaching and learning strategies, and how to evaluate IT resources for their teaching.19 This program was implemented through face-to-face workshops for core subjects, shared sessions for non-core subjects and dialogue sessions for the exchange of ideas and experiences amongst heads of departments. As a result, the MPITE evaluation report in 2001, suggested that 78 percent of teachers surveyed felt that the use of IT as a teaching tool had helped them to implement more learner-centered activities.

4.3.2 Chile

Realizing the potential that new technologies have to transform education in a relatively poor country, the Chilean government initiated the Enlaces program in 1990 (Box 4.4).18 One of the key findings from this has been that ‘well-trained and motivated teachers can improve the learning conditions with ICT, and can acquire ICT skills together with their students, thus preparing them more properly for the emerging knowledge society’.19 Fundamentally, Hepp et al. note in reviewing this program that ‘introducing ICT into the schools, without a proper staff development plan and without a pedagogical perspective, is a low-return investment’.20 Where resources are limited, as across much of the African continent, this is a lesson that really must be learnt quickly. Far too many programs are still beginning with the technology rather than the teachers. Another important feature noted from the Enlaces work has been the significance that motivated and competent management play in the delivery of such initiatives. In our experience, it is advisable to assemble a team with solid educational and technical background and also one with strong leadership and political backing so as to remain relatively unhindered in the face of continuous political change.12 These observations stress the key significance of both capacity building and management, but they also emphasize the need for effective evaluation: ‘if evaluation is not an 14 http://www.moe.gov.sg/edumall/mpite/professional/index.html - accessed 6th May 2005.
17 Hepp et al., 2004, p.34.
18 Hepp et al., 2004, p.37.
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integral part of each major decision, it will be difficult to reach sound and reliable conclusions about the effectiveness of the program and to decide whether or not there is need for adjustments and change.

### 4.4 CONCLUSIONS: FIVE KEY PRINCIPLES

This chapter has outlined some of the interwoven complexity of the interactions between capacity building, management, and measuring the effects of the use of ICT in education. If there is one overriding lesson to be learned, it is that these interactions are complex and as yet imperfectly understood. However, there are five key principles that underlie many of the chapter’s arguments:

1. **The importance of including a diversity of participants in the monitoring and evaluation procedures at the earliest stages of the implementation of ICT4E programs.** The introduction of new technologies and methods into learning environments provides an opportunity to open up education to a range of other innovations. ICTs are technologies designed to enhance the flow of information and communication; they are not ends in themselves. This therefore opens up education more widely, and creates a valuable opportunity for all those involved in education to reconsider their practices, and in so doing to develop a more reflective approach to their activities. At the very least, learners, teachers, administrators, government officials and external agents such as employers need to be involved in designing and implementing effective monitoring and evaluating procedures.

2. **Evaluation as a non-threatening process.** All too often, punitive systems of monitoring and evaluation are put in place, and failure is seen as something which brings shame. In many cultures, loss of face is something to be avoided at all cost. Therefore tricky issues are often negotiated in measuring the effects of ICT initiatives in education. However much we might wish to think otherwise, there is unfortunately almost always likely to be an element of coercion and control in the use of monitoring and evaluation. Nevertheless, it is of fundamental importance that all those involved should see such evaluations as part of a learning process, whereby people will not only become better educators and learners, but will also be more fulfilled in so doing. We often learn more from our mistakes than we do from our successes.

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**BOX 4.4: Chile: The Enlaces Evaluation System**

Enlaces [link], the Chilean ICT in education initiative, was begun in 1992 with the aim of integrating ICT as learning and teaching resources for all students and teachers in the ten thousand Chilean public schools. This year 2005, 88 percent of primary and 85 percent of secondary schools participated in Enlaces, covering 93 percent of the student population. During its implementation, Enlaces developed a variety of initiatives to evaluate and monitor the on going activities of the project as well as its products and possible impact.

Regarding monitoring, Enlaces developed web based systems that enabled schools and service providers to directly register the provision, reception, installation and configuration of the computer networks, annotate technical support visits and training activities developed in the schools. Using these systems, the national coordination of the program was able to follow up the status of the major activities of the project at any time and decide, for example, whether the services were accomplished and due to payment.

Concerning the evaluation of the quality of the services provided to the schools, Enlaces applied a periodic survey that was answered by the teachers and principals of the schools. This survey asked for teachers’ and principals’ perceptions about the quality of the technical support, training, and equipment provided to the schools. This information was then used to negotiate the contents and quality of the services to provide in the following period with the institutions working for the project.

In terms of its goals and aims, several surveys were used with principal teachers, computer lab coordinators and students, concerning the ICT infrastructure present in schools, ICT related policies at school level, self perception of ICT skills and obstacles for ICT uptake. Analysing these results, surveys were designed and implemented following international guidelines like OECD, www.oecd.org. Key results included the extensive time that computer labs were used for non-educational and non-pedagogical related activities, and the enormous impact that the project had in providing access to ICT to low income students. Additionally, several case studies were carried out concerning innovative pedagogical positions, which showed that there was clear evidence of the impact of ICT on students’ learning achievement as defined in the national curriculum and measured by the national students’ assessment test. However, the studies did show that teachers and students using ICT gained competences about ‘important concepts’ of the world and social relations beyond the school.

Adapted from Hinostroza et al.

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22 Hayg et al., 2004, p.50.
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3. Successful programs cannot be achieved overnight. The experiences of Enlaces emphasize with great clarity that it can take at least a decade of dedicated hard work to implement effective nationwide programs that use ICT appropriately in education. Initiatives require careful planning and considerable foresight if they are to be successful. Their management is of great importance, and central to this must be a program of appropriate monitoring and evaluation, through which lessons learnt in one phase can be implemented in the next.

4. Charismatic leadership. Successful monitoring and evaluation activities require a range of conditions to be in place, but paramount in the process is the quality of leadership and management. Some are cautious in drawing firm conclusions, and suggest that ‘it may be, therefore, that quality of leadership can account for ICT-related performance’24. ‘School leadership influences the relationship between ICT learning opportunities and pupil attainment’25. Using effective monitoring and evaluation procedures to learn what exactly it is about leadership that makes such a difference is therefore important. Equally, leaders and managers are essential to the successful implementation of the sorts of supportive evaluative mechanisms discussed in this chapter.

5. Starting with the teachers. There is a growing consensus that training teachers in the appropriate use of new technologies as part of a blended learning environment is one of the most important places to start in delivering effective ICT4E programs.26 As a first step, teachers need to be enabled and empowered to evaluate the effects of using new technologies in the classroom, and then to begin to develop their own communities of practice to assist them more effectively in enabling people of all ages to enhance their learning opportunities.

KEY REFERENCES


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KEY REFERENCES


5. PRO-EQUITY APPROACHES TO MONITORING AND EVALUATION: GENDER, MARGINALIZED GROUPS AND SPECIAL NEEDS POPULATIONS

Executive Summary

- M&E can play a significant role in supporting pro-equity approaches to ICT for education.
- A pro-equity approach to M&E should try to accomplish at least two goals. First, M&E specialists should engage in data collection with transparency, so as to identify the population target, and where the population fits into the national fabric and policy of poverty reduction. For example, what is the demographic breakdown of the intervention sample by gender, language, ethnicity, age, location, and income relative to the rest of the national population or society?
- Second, it is important to draw from M&E activities any conclusions about both policy formulators and program implementers that can address pro-equity issues. For example, evaluation results should be prepared in a manner that allows expansion of the program to additional marginalized groups (by caste, location, and other language group).
- Much can be done to support pro-equity and pro-MDG approaches to ICT and development—efforts that will benefit and be inclusive to nations and all its citizens.

5.1 PRO-EQUITY APPROACHES

Long before the term digital divide became a common way to describe gaps between the rich and poor in access and use of ICT, most policy makers, researchers and practitioners could at least agree on one thing: Reaching the poorest of the poor was going to be very difficult challenge. Even reaching the so-called ordinary poor (that is, men with some secondary schooling, living in predominantly urban areas) would entail challenges of electrical power, telecommunications connectivity, human resources infrastructure, and the like. Reaching the poorest of the poor (that is, illiterate women with little or no schooling, living in predominantly rural areas, and possibly speaking minority languages) would be considerably more difficult. The goals of EFA and MDG are very clear about the need to promote equity by gender (women and girls), special educational needs (SEN), and among “marginalized” populations (such as illiterate persons, ethnolinguistic minorities, refugees, and so forth). This chapter attempts to describe where M&E might be able to play a role in supporting pro-equity approaches to ICT for education (ICT4E).

Who are the ‘poor’ in the world today? Clearly, poverty is a relative term—the poor in New York would have resources quite different from the poor in urban Johannesburg or rural Senegal. Yet using UN data, there is general consensus, as stated in the 2004 World Bank Annual Report, that on average, about 10-20 percent of people in OECD countries are poor, while this number climbs to a range of 40-60 percent in the bottom third of LDCs. In poor LDCs, the characteristics of poverty include an average GNP per capita of less than 1-2 U.S. dollars per day, high illiteracy levels (including either illiteracy or functional illiteracy of 40-50 percent of the overall population), and relatively low social status (as related to gender, ethnicity, language, geographic location, and so on). It is variously estimated that only a tiny fraction (less than 5 percent) of people in OECD countries are poor, while this number climbs to a range of 40-60 percent in the bottom third of LDCs. In poor LDCs, the characteristics of poverty include an average GNP per capita of less than 1-2 U.S. dollars per day, high illiteracy levels (including either illiteracy or functional illiteracy of 40-50 percent of the overall population), and relatively low social status (as related to gender, ethnicity, language, geographic location, and so on). It is variously estimated that only a tiny fraction (less than 5 percent) of
global ICT investments focus on the poor as defined above. Indeed, when considering the life opportunities of the poorest populations, direct investments in ICT have clearly been more rhetorical than real. Yet such work is crucial if the MDGs of universal basic education and literacy are to be achieved.

What is the overall scale of the target population that is covered within the MDG-ICT framework above? Groups comprised of women and those speaking minority-languages may be overlapping, but clearly contain a large majority of those on the wrong side of the digital divide. Further, there are over 100 million primary school-aged children out of school, and about one billion adult illiterates, the majority of whom reside in the poorest countries of South Asia and Africa. Even these large numbers are likely to be a serious underestimation of literacy needs in the digital age. Indeed, if a larger set of skill competencies (reading, writing, math, ICT literacy) were included, along with the limited efficiency of adult literacy and second chance education programs, and the very low quality of many poor rural schools in developing countries, it would probably be more accurate to say that those in need of improved basic skills (required in order to effectively use ICT) today represent between 2-3 billion individuals (Wagner & Kozma, 2005). Of these individuals, we might estimate that at least half are among the poorest of the poor, as they will undoubtedly be over-represented by ethno-linguistic groups for whom ICT access in the international languages of the world (i.e., English, French, Spanish) is quite limited.

This raises a key question: Are the methods and indicators most commonly used in the monitoring and evaluation of ICT in education initiatives biased in any key ways that will work against the narrowing of gaps and towards the growth of equity in ICT for education? Put another way: Would the availability of equity-sensitive M&E indicators work towards promoting greater inclusion of populations within the MDGs?

Consider, for example, the Bridges to the Future Initiative project undertaken in India. In this project, a specific focus was on how to reach the most challenging poor populations, but within fiscal constraints that meant that an ICT infrastructure had to pre-exist in order to reduce expenditures. Within this important constraint, the project had to determine the best way to achieve MDG education goals, and measure the impact of multimedia instructional material on youth and young adults (see Box 5.1).

Many projects in the ICT sector claim to be ‘bridging’ the digital divide. But what divide are they bridging? Is it between the rural and urban? Between boys/men and girls/women? Between the well-off and the less-well-off? In many leading studies, including most of those referenced in this handbook, we have relatively little idea of the demographics around equity issues. We may be helping the “poor,” but are we doing so at the expense of other poor people? While investment in a given ICT4e initiative may be effective and desirable for its target groups, what extent does it satisfy the priority in the MDGs to reach the most disadvantaged? If a student is in high school in the lowest third of GNP countries, he/she is likely to already be in the top 10-20 percent of the socio-economic structure. Will helping this individual (no doubt a useful goal in and of itself) help achieve greater equity in the country concerned? In the following sections, we describe a number of key MDG areas that will need to be the subject of considerably greater investment if the MDG targets are to be met.

5.2 GENDER

Since the introduction of personal computers in developed countries in the early 1980’s, the ‘convention wisdom’ has been that introducing ICTs in schools would favor males. Yet, as we have seen in numerous examples across the world, there are many cases where girls’ and women’s motivation and learning in ICT for education programs is equal to or greater than that of boys and men. The root causes of the initial ‘digital divide’ are many, and the focus of this handbook is on how to address them. Yet what is clear is that the goals of the MDG education dimension are directly linked to the overall MDG targets of reducing poverty and ensuring equal opportunity for all groups in society. The potential for ICT to contribute significantly to reducing poverty, increasing opportunity, and ultimately achieving the MDGs is clear. But what is less clear is how ICT can contribute to the poorest of the poor, to the least well-off, and to groups that have been historically excluded from the benefits of education.

We suggest that ICT4E initiatives should consider, as a priority, how to identify and reach the MDG target groups of girls, women, and those speaking minority-languages, and consider the potential for ICT to contribute to the achievement of MDG targets in these areas. For example, while it is important to ensure that boys and girls have equal opportunity to participate in ICT programs, the focus should also be on girls’ access to ICT, and the potential for ICT to contribute to the achievement of MDG targets for girls. Similarly, while it is important to ensure that all students have access to ICT, the focus should also be on students who are excluded from ICT programs, such as those speaking minority-languages, and the potential for ICT to contribute to the achievement of MDG targets for these students.

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gender divide’ (conscious or unconscious) against females have generally been perceived (by policy makers) to relate to issues such as lack of a safe place of access, limited literacy, and little in the way of useful outcomes. Another interpretation, of course, is that men’s access to economic resources in the ‘external’, (outside of home) environment simply put them in greater proximity to technology access. We will unlikely know the definitive set of causes, but we do know the results. In most countries today, especially outside of the OECD, women’s access to ICT inside an educational system lags significantly behind that of men’s (see Table 5.1).

As with most areas of development, such gender biases are clearly counterproductive for all social indices. In the area of ICT for Development (ICT4D), we now have many examples of women (and girls) being at the forefront of the social and economic uses of new ICT. In one of the best-known examples of the use of microcredit for women, Gramsner Bank in Bangladesh made loans to women, even poor and illiterate women, for the creation of small mobile phone businesses. The results were dramatic—not only were the women more reliable then men in paying back the loans, but they also made use of their local social networks to run highly successful enterprises even in poor, rural areas. There are many such examples today that show that women in developing countries recognize the empowering dimensions and economic returns of ICT.

When considering gender within the M&E area, it is increasingly the case that gender is a variable of interest. Today, gender is increasingly taken note of by program implementers, and the importance of gender in development processes overall now assures more than ever before, that ICT programs will be ‘gendered’. See Box 5.2 for some examples of who to improve a gender-sensitive approach to ICT4E.

BOX 5.1. India: Focus on ICT and the poor in the Bridges to the Future Initiative

The Bridges to the Future Initiative (BFI) in India provides multimedia, local language resources on literacy and vocational training for out-of-school youth and adults—about 50 percent of the population in poor parts of India that never had access to and/or completion of quality primary or secondary schooling. A key aspect of the BFI is that seeks to address directly the needs of the poorest sectors of the population in developing countries with the best of user-friendly ICT-based instructional tools. According to UN statistics, there are new literates in India (270 million) than in any other country. With a 35 percent adult illiteracy rate, economic and social development for all is highly constrained. While great strides in Indian education have been made, it is now clear that many schools are able to offer only inadequate quality of instruction, leading to a primary school dropout rate of between 33.50 percent across the poorest states of India, including in Andhra Pradesh state where the BFI has been operating since 2003. Thus, the main target are the two tens of millions of illiterate youth (ages 9-20 years) who are at risk of never getting a good job, performing poorly in trades that are education-dependent (especially those that change with the knowledge economy), and suffering a variety of health consequences due to poor education and income. Many of these youth (especially girls and young women) have had some schooling, but often too poor in quality for these individuals to achieve a functional literacy ability.

The BFI model is designed to take advantage of abounding ICT infrastructure, largely in secondary schools, and create contexts in which such out-of-school youth have access. The instructional model builds on the oral competence of the learners in their mother-tongue, which is generally the first language to which they are exposed (outside home) environment simply put them in greater proximity to technology access. We will unlikely know the definitive set of causes, but we do know the results. In most countries today, especially outside of the OECD, women’s access to ICT inside an educational system lags significantly behind that of men’s (see Table 5.1). The area of ICT4D, we now have many examples of women (and girls) being at the forefront of the social and economic uses of new ICT. In one of the best-known examples of the use of microcredit for women, Gramsner Bank in Bangladesh made loans to women, even poor and illiterate women, for the creation of small mobile phone businesses. The results were dramatic—not only were the women more reliable then men in paying back the loans, but they also made use of their local social networks to run highly successful enterprises even in poor, rural areas. There are many such examples today that show that women in developing countries recognize the empowering dimensions and economic returns of ICT. When considering gender within the M&E area, it is increasingly the case that gender is a variable of interest. Today, gender is increasingly taken note of by program implementers, and the importance of gender in development processes overall now assures more than ever before, that ICT programs will be ‘gendered’. See Box 5.2 for some examples of who to improve a gender-sensitive approach to ICT4E.4 Wagner, 2001; Wagner & Daswani, 2005; Wagner & Day, 2004; for more information on the BFI, see www.literacy.org or www.bridgestothefuture.org.

Being a member of a marginalized, usually an ethno-linguistic minority group, often has a broad set of deleterious social and economic consequences. In ICT4E projects, such factors must be taken into account directly, much as the issue of gender discrimination. As yet, however, most technology projects have, for

5.3 MARGINALIZED POPULATIONS

As noted earlier, the most disadvantaged groups in all societies tend to be those “on the margin”—on the socio-economic and cultural-linguistic periphery of a national population. Beyond issues of gender and age (which also can be marginalizing), such marginalized populations usually have one or more of the following kinds of characteristics:

- Belong to an indigenous people or special caste or race that has a pattern of historical social discrimination;
- Speak a language (or dialect) other than a major regional or national (or international) language;
- Have a history of little or no education, and likely to be illiterate or low-literate;
- Reside in, or migrate from, a historically deprived (usually rural) geographical region.

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a number of (often political) reasons, chosen to focus on ‘majority’ digital divide issues, rather than ‘minority’ or marginalized group issues. As with gender, M&E can play an important role in focusing attention on the problem, as well as providing a better targeting of implementation processes.

Language is an exceptionally important marginalizing factor in the digital age. One reason for this is that the Internet itself is not language-neutral. Recent research shows that English is more present on the World Wide Web (approximately 32 percent in October 2005) than any other language, and is in fact with the next nine most prominent languages combined. Interestingly, the dominance of English has dropped somewhat from an even greater dominance only a couple of years earlier (65 percent in mid-2001). No other language seems to rival the English total. Even though Chinese (at 13 percent of the world total) is rapidly growing, the role of English as a preferred global second language of communication will almost certainly guarantee its global dominance for years to come. Of course, there are major changes taking place on the Internet today, and there is serious disagreement as to the breadth and depth of availability and use of digital information. There are more languages—outside of the top ten—in use every year. Nonetheless, most research, as of 2005, shows that the top ten languages dominate 80 percent of Internet use today, leaving those who have not mastered one of these languages as a first or second language in the margins of global information.

While similar data are not available for language-based instructional software production, a substantial dominance is likely to be found for English today, at the expense of other international languages, and major regional languages (e.g., Hindi, Swahili). Further, local minority/indigenous languages (e.g., Telugu in India, with 50 million speakers; or Mayan in Mexico, with several million speakers) receive relatively little digital attention at all. It should also be noted that most of the monolingual speakers of indigenous languages are female, which adds an additional burden on the obstacles that women face in ICT4E projects.

Illiteracy and low-literacy, when combined with ethno-linguistic status, is a further marginalizing factor. UNESCO11 has estimated that there are nearly 862 million illiterates in the world aged 15 and above. One could estimate that at least 80-90 percent of this illiterate population is from the types of marginalized groups detailed above. Of this total population, we know that nearly 60 percent is comprised of women, most of whom are from the poorest countries or regions in the world. Overall, developing countries have increased literacy rates by 6.6 percent between 1990 and 2000. However, such increases in official literacy rates often have not kept pace with population growth (especially in South Asia and Sub-Saharan Africa) with the actual number of illiterate citizens having increased during the same period of time. As a consequence, illiteracy and low-literacy are fairly direct indicators of those who are marginalized in each society; furthermore such skills are central to ICT4E success due to their role in serving as a base for technological skill proficiency.

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*BOX 5.2. Several strategies have proven effective in encouraging the continued participation of girls and women in education in general

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<td>Alternative schools with flexible schedules</td>
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<td>Vocational training</td>
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Pro-Equity Approaches to Monitoring and Evaluation
5.4 SPECIAL EDUCATIONAL NEEDS

New technologies have long been seen in industrialized countries as an exceptional way to reach out to individuals who are especially challenged with physical and psychological handicaps. Indeed, when resources can be deployed, new ICTs can be seen in a host of efforts to aid those with sight, hearing, and other psychological handicaps. Thus, “special educational needs” (SEN), a subset of the broader domain of special needs, usually refers to the sub-domain of ICT4E where two inter-related issues may arise: (1) Does the SEN learner have particular problems (such as visual or hearing impairments, or learning disabilities, and so on) that make the *ordinary* person-technology device (PC, PDA, other) interaction difficult (e.g., difficulty in seeing print on a screen)? or (2) are there particular technology devices (assistive technologies) that are or can be especially tailored for SEN learners such that they are responsive to the particular needs of the learner (e.g., voice recognition technologies for the blind)? While there is a long history of use of such assistive technologies for learning, mainly in industrialized countries (such as described in Box 6.3), due to resource constraints, this area has only begun to receive significant attention in developing countries.

In recent years, AT has been used increasingly in developing countries as well. Popular tools such as JAWS, a screen-reader software for the blind or visually impaired offers access to a wide variety of information, education and job-related applications (see http://www.synapscaptive.com/). Two case examples are provided below that provide a sense of the types of AT in use, and the type of M&E that has been employed. In the first example, in Morocco (Box 5.4), visually impaired university students were provided with AT software that supported web access. The case study evaluation provided evidence of impact on a small number of students, with the hope of convincing government authorities of the utility of ICT/AT for education on a larger scale.

In a second effort, SEN adult learners in four Central American countries were provided with both AT software and hardware that was designed to foster employment skills (see Box 5.5). As may be seen, a variety of tools were deployed, and a group of several hundred individuals were evaluated and trained.

There is little doubt that the notion of inclusive education is taking hold across the world, both as national and international policy, and this is a priority central to the MDGs. OECD countries have moved strongly

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**BOX 5.3. United Kingdom: Assistive technologies in education**

Assistive Technology (AT) is the software and technology which helps people with disabilities and special needs to overcome the additional challenges they have in communication and learning. For example, speech-recognition software, onscreen keyboards and mouse alternatives may be used to help a person who has motor difficulties communicate and develop positive relationships with peers and teachers. Evaluation into the use of assistive technology is limited and often lacks detailed and comprehensive criteria for assessing the effectiveness of the device. Research includes three fairly positive outcomes: On the use of assistive technologies for people with profound multiple learning difficulties using micro-switches and speech output systems. In particular, some primary students were unable to use such systems because the software has failed to recognize their high-pitched voices or unclear speech. Most of the research evaluating speech recognition systems has concentrated on the reliability and robustness of the systems for general use. Much less evaluative work has been undertaken on the ways in which speech-recognition systems can be used and customized to meet the particular needs of individuals.

Adapted from Board. 12

12 Board, 2003, page 3

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60 Monitoring and Evaluation of ICT in Education Projects
While technological tools in LDCs are only beginning to be utilized, they nonetheless hold out hope for the millions in poor countries that are in need of additional ways to be included into the age of global education and information. In Morocco, people with visual impairment, be it total or partial, are disadvantaged in two ways in terms of access to education. First, the usually haphazard social origins of these individuals poverty and memory of their parents, and the very limited availability of specialized institutions restrict their access to education. Second, even those having the opportunity to go to school are usually blocked by the lack of pedagogical materials adapted to their needs. Currently, specialized schools for the blind are very poorly equipped. The production of such materials is still far from responding to current needs. Blind students need help to compensate for the absence of adapted pedagogical materials (reference books, etc.).

The lack of adapted pedagogical material has slowed down the progress of blind students significantly and has increased the degree of dependence on others (people assisting with their voices or offering writing services, etc.).

For its first year of operation, a group of 20 blind students at the Cadi Ayad University Multimedia Center for the Blind (UMBC) were invited to benefit from a new training program. Results of the project to date, based on a qualitative intervention assessment, include: (1) The student beneficiaries declare training gained much autonomy and independence. Most have acquired the skills needed for the independent use of the computer. Having benefited from free access to the UMBC at any time and having been engaged in a process of self-learning with the assistance of some volunteering students, the students managed to acquire many pedagogical tools and to transform them into audio files. (2) Some of the most motivated students managed to use resources available through the Internet by browsing the web and using changing information through email. (3) Some of the most motivated student engaged in training of trainers. Having benefited themselves from the training, they started ensuring the supervision of sessions of free access and giving personalized lessons to other beneficiaries. The evaluation undertaken today is an important step in demonstrating to government authorities that ICTs are not only useful, but that universities with research and evaluation capacities can play an important role in justifying further implementation activities.

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5.5 CONCLUSIONS: TOWARDS A PRO-EQUITY USE OF M&E

Many of the current ICT for education efforts, even if deemed to have been successful, have not included a sufficiently pro-equity perspective. This is obvious for various reasons. Earlier, we asked, rhetorically, “Whose divide is really being bridged?” But, we may also simply observe the following: The vast majority of software/web content (mainly in major languages such as English, Chinese, French, Spanish) is of little use to the many millions of marginalized people for reasons of literacy, language, or culture. Of course, the private sector produces, in large part, for the largest potential and most lucrative market—with clear (and negative) consequences for the poor in most circumstances. It is increasingly clear that user-friendly multimedia tools can satisfy the needs of the poor to a much greater extent than hitherto produced.18 Providing such tools and developing the human resources capacity to support the local development and distribution of relevant content is one important way to help initiate a positive spiral of sustainable development. Indeed, if the private sector can learn to market to the poor (much as soap manufacturers have discovered that smaller soap bars can be sold to a much larger segment of the poor in India), then real markets need to be found that support pro-equity approaches of investment.

How can M&E help this situation? A pro-equity approach to M&E could accomplish two goals: First, M&E specialists should engage in data collection with transparency as to who comprises the population target, and where this population fits into the national fabric and policy of poverty reduction. For example, what is the demographic breakdown of the intervention sample by gender, language, ethnicity, age, location, and income relative to the rest of the national population? Second, it is important to draw from M&E activities any conclusions about both policy formation and program implementation that can address pro-equity issues. For example, in the BFI-India project (Box 5.1, above), evaluation results should be prepared in a manner that allows expansion of the program to additional marginalized groups (by caste, location and other language groups).

### BOX 5.6 Colombia: Pro-Gender Approach to Monitoring and Evaluation

Bosa [a locality in Colombia] has a telecenter located in a lower class neighborhood where the majority of people are plain workers or unemployed. It is housed in Kerigma, a community cultural center, a community meeting space for different groups and organizations.

Many people of the community feel they are overlooked by the government and therefore do not have access to computer training. Children and housekeeping are their main interests and activities. Representatives of, Virtuous Mothers, Eco-Mujer, and Women’s Centre took part in a Gender and Evaluation Monitoring project in 2003.

- A series of workshops were held, the results of which are provided in the comments below from participants.
- Banda de mujeres involved in using computers. Curiosity, fear of technology and the unknown, uneasiness, fear of breaking things, making mistakes, being mocked, are only a few of the difficulties faced by people who have not used a computer or do not know much about it.
- Women also think that computers are something fascinating, a new world where they do not belong
- There is a need to learn and be taught in using computers in a sensitive manner.
- There is a lot of discrimination against women in this field. Society seems to give little importance to women’s needs in the field of computer technology.
- Women have felt they were locked down or by their own children because they don’t know how to use a computer. They also feel bad because they can’t help their children with their homework because they know nothing about computer studies. “We don’t want to be called donkeys,” one of them said.
- Women have to respect themselves and make others respect the role they play in society.
- Sometimes we feel that our only right is the right to be in the kitchen.

Adapted from APCWomen.[17]

17 Wagner & Woman, 2005.

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It is also important to keep in mind the fundamental reality that effective programs, even without rigorous and state-of-the-art M&E method, can be found and supported. That is, while we advocate strongly here for M&E in all interventions, there are some projects, nonetheless, with little empirical data that we believe (from anecdote and observation) are worth greater investments. One case in point is a women’s ICT-based program in Colombia (Box 5.6). Here we see the power of individual women in describing their own situation. Household surveys and the like cannot provide much additional value to what a group of motivated and reflective participants contributed in a set of workshops. Of course, simply becoming aware of the key issues as described in the Colombia example is not the same as knowing whether these issues have been effectively addressed from an evidenced-based perspective.

Much can and needs to be done to support pro-equity and pro-MDG approaches to ICT and development—efforts that will benefit and be inclusive to nations and all their citizens. The role of M&E in this domain should not be underestimated. As Margaret Mead famously said: “Never doubt that a small group of thoughtful, committed people can change the world. Indeed, it is the only thing that ever has.” In a parallel fashion, it is only through a small set of credible studies aligned with policy prerogatives (such as the MDGs) that national policy change can take place in a guided fashion. This is the pro-equity challenge, a core component of what this M&E effort should be striving to achieve.

**KEY REFERENCES**


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6. DOS AND DON'TS IN MONITORING AND EVALUATION

TIM UNWIN AND BOB DAY

Executive Summary:

This chapter draws together the key recommendations of the previous chapters. It is designed to be accessible to policy makers, program managers, implementers and evaluators, as well as lay users, at the international and national levels. Not only do we reiterate some themes from the previous chapters (identified in parentheses after each subheading, where possible), but it also seeks to identify less evident issues, especially those that are of longer-term benefit and impact.

Of course, do and don'ts are often merely different sides of the same coin. However, we are also conscious that there are things that we can practically do that can make a real difference to the success of technology enhanced learning programs, as well as traps that we all too often fall into if we do not consciously think about things we should not do. The following sections are organized accordingly. Moreover, there are some issues that are of such importance that we have decided to discuss them from different angles in each of the two main sections.

6.1 DOS

In this section, we summarize the most important issues that practitioners should actively do to appropriately introduce and use monitoring and evaluation techniques in implementing any initiative aimed at ICT enhanced learning.

Things to do…

1. Do include monitoring and evaluation at all stages in educational programs (3.4).

This Handbook has emphasized throughout the importance of creating a virtuous cycle of improvement in education through the use of monitoring and evaluation techniques as integral components of all ICT4E activities from their inception. Thus, teachers and learners are encouraged to both monitor their progress and think of ways in which they could enhance what they have been doing in a system of continual self-evaluation and quality enhancement. There should then be opportunities for this to be fed back into systemic aspects of educational provision through regular evaluation. Monitoring and evaluation should not therefore be treated as one-off exercises, but should rather be embedded across all aspects of educational provision. Finally, practitioners should clearly distinguish monitoring activities from the formative and summative evaluation of performance criteria as well as from any subsequent research.

2. Do recognize that although monitoring and evaluation have significant cost, time and human resource implications, they are essential for successful programs (2; 3.11).

The temptation to avoid these additional costs until the later stages of any ICT4E initiative should be resisted. Instead, appropriate monitoring and evaluation processes for a particular initiative should be identified (as described in chapters 2 and 3), and the associated overhead costs should be estimated up front. It is then essential to ensure that management personnel and donor agencies understand and are fully committed to these overheads, as well as being committed to take forward the recommendations

...
resulting from monitoring and evaluation. We estimate that about 5-10 percent of any ICT4E project should be set aside for monitoring and evaluation, depending on the scope and scale of the project.

3. Do ensure that those involved in the monitoring and evaluation are appropriately trained and understand the importance of monitoring and evaluation (2, 3.3).

It is essential that the implementers understand the methods and reasoning behind the monitoring and evaluation techniques that they are employing. Depending on the initiative, different levels of implementer may be needed, with accordingly different types of monitoring and evaluation training. It is equally important that program implementers accept responsibility for the processes used, are fully committed to them, and feel empowered to convince all other stakeholders (including the inevitable skeptics) of their short and long-term benefits. Monitoring and evaluation is not an exercise that can be safely left to paid consultants from the "head office".

4. Do involve as many stakeholders as possible in monitoring and evaluation (2, 3.10).

We are not dealing with an exact science. The best results are as dependent on involving a broad range of appropriate stakeholders as they are on identifying the most suitable and pragmatic monitoring and evaluation techniques. This requires significant effort at an initiative's inception in identifying who the key target groups will be in the implementation, as well as understanding what anticipated outcomes are desired for each of these groups. In addition to improving quality and the likelihood of sustainability, this approach creates awareness and helps to build capacity.

5. Do involve the learners in any evaluation process (2, 3.10).

It is remarkable how few studies actually take into consideration or report the attitudes and opinions of the end-beneficiaries of ICT-based educational initiatives. Our experience in Africa is that despite children being the beneficiaries of much well-intentioned support from civil society organisations, and the recipients of visits from many foreign observers, they are seldom, if ever, asked for their opinions. Consequently, the educational initiatives that they were 'subjected to' may not necessarily be meeting their main needs and priorities. Learners should therefore be involved from the earliest planning stages in the implementation of educational ICT programs. They should be included in the identification of targets, in the design of the monitoring and evaluation processes, and in the reporting and dissemination phases. Remember too, that everyone is a learner! Teachers are just as much learners as pupils, especially in the early stages of the implementation of technology-enhanced educational initiatives.

6. Do assess student learning (2).

In many programs or projects, the most important outcome is an increase in student learning. It is important to measure this as directly as is possible and affordable. Learning achievement indicators should be linked to the goals of the project and the ways ICT are used. To the extent appropriate, the full range of student learning outcomes should be measured: school subject learning, ICT skills, and 21st century skills. Often this requires the design of learning measures that are customized to a particular program or project.

7. Do make sure that all monitoring, evaluation and assessment instruments are carefully pilot tested (1; 3.6).

It is crucial to ensure that the chosen instruments do indeed measure what they are intended to measure in the circumstances within which the measurements are to be made. This includes the development of appropriate indicators to monitor outputs and outcomes, as well as ensuring that the data that you collect is really relevant and that you know what you will do with the data once you have collected it. When it is important to establish causality, use experimental and quasi-experimental evaluation designs. For example, to establish that an educational improvement is due to the use of ICT, it is necessary to have some schools or classrooms use ICT while other equivalent schools or classrooms do not use it. However, the introduction of ICT is often accompanied by such changes as teacher training, new curriculum, or new pedagogical approaches. Indeed, we recommend this. In these cases, all these interventions should be considered as a package, and only combined impact can be measured.

8. Do ensure that you promote the idea that monitoring and evaluation is about learning from the experiences of a program (3.12, 4).

The establishment of a culture of monitoring and evaluation is important—where all stakeholders appreciate the short and long-term benefits, and accept the additional costs and effort involved. No
matter how sceptical some may become when confronted with the near-term difficulties of M&E (costs, time, training, etc.), it is important to emphasise the cumulative impact of the learning and associated research that this effort will stimulate, and the improved probability of genuinely sustainable development that will result. The approach should be flexible and innovative, geared to the needs of the stakeholders rather than a recipe book (or this Handbook)! One must incorporate a range of different approaches to M&E, and be prepared to make adaptations as the project evolves.

9. Do disseminate your findings so that others can benefit from your experiences (3.10-12, 4).

It is all too easy once an evaluation has been undertaken for it to be filed away and forgotten. Apart from minimising any practical impact on the learning environment, it will also prevent others (e.g., direct stakeholders or those interested in undertaking a similar program in the future) from learning from the successes and mistakes recorded. Moreover, this dissemination needs to be in as diverse media as possible to provide access to many different groups of people. Publishing excellent reports in obscure academic journals is not good enough! Nor are simplistic press releases with senior officers pronouncing on the ‘good works’ accomplished! Monitoring and evaluation reports should be made accessible to all major stakeholders at built in checkpoints and milestones, and presented in formats appropriate for the major stakeholders, using computer-based tools and electronic reporting where appropriate.

10. Do remember to keep the MDGs in mind, and the need to prioritize the most excluded (7).

A focus on the poor within MDG goals does not automatically happen when working on digital divide problems. Not all gaps are created equal, so to speak. Some have more valence than others. While there are many ways that can help varying groups of individuals, helping promote ICTs in peri-urban Indian high schools in English is not the same thing as helping girls who have dropped out of primary school get back into high schools in English.

11. Do try to create M&E tools that allow the possibility of supporting not only the MDG goals, but also effective strategies that work (5).

Using internationally developed M&E tools can provide important ways to compare and contrast results of ICT for education worldwide; but they made also mask important ways in which locally developed tools can provide greater precision for project implementation.

6.2. DON’TS

In advocating the importance of disseminating good practice in monitoring and evaluation, the authors of this handbook have always tried to be positive in their suggestions. We have thus sought to encourage people to be innovative, to build on examples of successful initiatives elsewhere, and to develop monitoring and evaluation practices that are integral to the entire education process. This section of the Handbook is rather different in approach. We have tried here to provide a summary of some of the things that tend to go wrong in the practical delivery of monitoring and evaluation activities.

Things not to do…

1. Don’t simply monitor and evaluate for the sake of it; don’t measure for the sake of measuring (3.6).

It is too easy to get into the habit of evaluating and measuring for the sake of it, without any real purpose for so doing. Even worse can be the situation where an external donor or agency supporting an educational initiative insists that there should be an M&E process in place, without anyone involved really knowing why. Such initiatives, while satisfying the interests of the donors, may have little or no real benefit for the intended beneficiaries. For example, it is much more important to know whether the methods used have actually enhanced the experiences of learners than it is to know whether a school has acquired a targeted number of computers. This also highlights the need for such evaluations matters to be in as diverse media as possible to provide access to many different groups of people. Publishing excellent reports in obscure academic journals is not good enough! Nor are simplistic press releases with senior officers pronouncing on the ‘good works’ accomplished! Monitoring and evaluation reports should be made accessible to all major stakeholders at built in checkpoints and milestones, and presented in formats appropriate for the major stakeholders, using computer-based tools and electronic reporting where appropriate.

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to focus primarily on outputs, rather than simply measuring the inputs into a program. For monitoring to be part of an ongoing process of educational enhancement it is crucial that all involved in the process know why they are engaged in it.

2. Don’t impose a punitive management structure that seeks to use monitoring and evaluation as a way of negatively criticizing performance (3.12).

Monitoring and evaluation procedures are sometimes imposed in a top-down manner on unwilling educators who fear that it is being used merely as a means to criticize their performance. The introduction of new technologies into learning contexts can be threatening, and in order to minimize such threats it is essential that teachers are closely involved in the design and implementation of the relevant procedures. The use of ICT may transform the role of a teacher into that of a facilitator, and can subtly shift the power relationships within a learning environment away from the teacher and towards the learner. This need not be seen as threat, because learners invariably retain their respect and admiration for teachers who actually help them to learn. Managers should nevertheless make it clear from the outset that they are not using monitoring and evaluation processes to criticize individual teacher performances, but rather as part of a package of activities designed to achieve an overall increase in educational attainment at several levels.

3. Don’t embark on monitoring and evaluation unless sufficient funding is in place.

Successful monitoring and evaluation must build on appropriate and relevant baseline studies that provide the basis for comparative accounts of the impact that any initiative has had. This cannot be done after the event, and neither can it be necessarily be done cheaply. It is therefore essential for sufficient funding to be in place at the start of any such initiative so that a comprehensive M&E program can be incorporated from the very beginning. The allocation of funding is also an indication that those supporting or proposing the initiative are also really committed to seeing it through effectively, and if necessary to change aspects of delivery on the way in response to the comments of teachers and learners. Given the difficulty and complexity of implementing technology-enhanced learning activities, often with limited resources, it is also simply not feasible to expect those involved to spend their time chasing additional resources to undertake the monitoring activities that should have been in place at the start! Such effort is highly likely to detract from the actual implementation of the proposed activities themselves. Another aspect of this is that if funding gets tight towards the end of the program, don’t simply save costs by cutting the monitoring and evaluation.

4. Don’t try to rush the implementation of ICT for education initiatives (2; 3.12; 4).

Successful and sustainable programs designed to enhance education through the use of new technologies cannot be implemented overnight (see Chile Box 4.4). There is a great deal of desire to implement rapid changes designed to transform educational systems in poor countries overnight, but this is usually unrealistic and unrealistic. We need to plan systemic changes over at least a decade, and not merely concentrate on things that can be done in the short term. It also takes time for the results of regular monitoring to be clear, and for these then to be incorporated into changes in the educational system under consideration. Before a great deal is said about the influence of ICT on learning, we need to have undertaken sufficient longitudinal studies to enable reliable conclusions to be drawn about their real costs and benefits.

5. Don’t focus exclusively on the technology (1).

It is tempting in monitoring and evaluating the role of new technologies in education programs to focus exclusively on the technology. However, it may be, for example, that the key success factor in a particular ICT-based program is the increased attention given to teachers and their training, rather than their actual use of the technology itself. We must be sure that we concentrate primarily on the educational objectives, and explore a sufficiently wide range of causal variables before firm conclusions are reached.

6. Don’t allow self-reporting to be the only way to ascertain learning in a target population; and don’t only use external people for monitoring and evaluation (3.3).

It is not easy to get the balance right between self-monitoring and external evaluation. However, it is very important that all such processes include not only the relevant stakeholders, but also experienced people from ‘outside’ who can bring a different perspective, and ask the difficult questions that could so
easily be ignored in a purely self-reporting environment. In so doing, though, it is important that people with practical experience and cultural sensitivity are chosen actually to work with these communities to identify how best to enhance learning outcomes.

**Things not to forget…**

7. Don't forget that "culture is local" (5).

Be aware of the anthropological dimension of all interventions, especially those in multicultural societies. No technology is culture-neutral, nor is any implementation that uses multimedia, linguistic and other educational content. When designing monitoring and evaluation tools, these must not be simply dropped in from other studies carried out elsewhere. They need to be refined to suit local needs and cultures.

8. Don't forget to consider the unintended results of programs (chap 1; 3.4).

Programs have both intended and unintended results. Evaluations focus mainly on intended results, because that is what they are usually specifically set up to do. Post-project evaluation reviews, desired by many donors, typically measure whether a project has delivered on its targets. Rarely do they seek to explore other impacts that they may have had along the way. It could be, for example, that the introduction of ICT into a learning environment has little effect on the formal educational processes as measured by traditional examination systems, whereas learners may have gained a wealth of other skills and knowledge through using such facilities. This learning impact could be missed entirely by an evaluation that concentrated only on the effects of the changes on examination performance (See Namibia, Box 3.1).

9. Don't forget that ICT creates a wide variety of technologies – not just computers (1; 3.7).

With all of the emphasis on the use of computers and the Internet (see Khanya Project Box 3.3), it is very important that other technologies are not ignored. Basic technologies such as radio and television have many uses in the enhancement of education, as do recent technologies such as the use of mobile telephones and other hand-held devices. The ways in which all of these different technologies enhance both information transfer and communication need to be fully investigated before any convincing conclusions are drawn.

10. Don't forget to manage the key-to-process with key stakeholders (3.10; 4).

The importance of learners in the processes of monitoring and evaluation has already been stressed. However, it is important that other groups are also not forgotten. Precisely who these stakeholders are will vary depending on the circumstances, but the list of stakeholders (see Box 4.1) provides a quick check on some of the most important people who should always be included. It is all too easy, for example, to forget to involve parents, employers and even government departments in undertaking monitoring and evaluation processes. Failure to include them will not only give rise to a partial set of conclusions, but more importantly it will also mean that it will be much less easy to implement any consequent recommendations. If people feel that they have been involved in the process, they are much more likely to be positive about its proposed action plan.

11. Don't forget the importance of contextual and geographical variation (1; 3.7; 5).

The actual places where monitoring and evaluation are undertaken are crucial factors influencing the results obtained. Focusing on a group of urban schools with access to electricity and the Internet may be important if one wants to show what is potentially feasible in poor countries. However, if one wants to obtain a wider picture of the role of technology in educational programs across Africa, for example, it is equally important to monitor their uses in some of the most marginalized and poorly served communities across the continent. It is therefore essential that one does not forget to incorporate appropriate sampling strategies in monitoring and evaluation activities (5).

And finally…

12. Don't worry if you don't get it right the first time (ALL chapters!)

There is no definitively correct way to undertake monitoring and evaluation of technology enhanced learning programs. This Handbook has tried to provide users with a range of ideas and a set of possible tools that they might use in the particular circumstances in which they find themselves. There are no
absolutely right or wrong answers in how to go about this. Taking risks and making mistakes is how progress is made.

13. Don’t leave your ICT implementation strategy talks without having monitoring and evaluation as a funded component of the process. Learning from our mistakes, and yes, successes, is the only way (a la Margaret Mead cited in Chapter 5) that we will be able to change how things are done.

6.3. CONCLUSION

We hope that readers are by now convinced that appropriate monitoring and evaluation is essential for the successful implementation of any kind of ICT4E initiative, and that they will also have an understanding of the type of process most relevant to their needs. Cross-references have been provided, where appropriate, to evidence from case studies in the various chapters. There are also a variety of in-depth tools and case information provided in the Annexes. The present document is necessarily a ‘work in progress’, and we trust that others will be able to build on the present material so that some later compilation will be able to extend further our collective ability to be more certain of investments in ICT4E.

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Annex 1. UN Millennium Development Goals Targets which can be supported by ICT4D

Goal 1. Eradicate extreme poverty and hunger
- Target 1: Halve, between 1990 and 2015, the proportion of people whose income is less than one dollar a day
- Target 2: Halve, between 1990 and 2015, the proportion of people who suffer from hunger

Goal 2. Achieve universal primary education
- Target 3: Ensure that, by 2015, children everywhere, boys and girls alike, will be able to complete a full course of primary schooling

Goal 3. Promote gender equality and empower women
- Target 4: Eliminate gender disparity in primary and secondary education, preferably by 2005, and to all levels of education no later than 2015

Goal 4. Reduce child mortality
- Target 5: Reduce by two thirds, between 1990 and 2015, the under-five mortality rate

Goal 5. Improve maternal health
- Target 6: Reduce by three quarters, between 1990 and 2015, the maternal mortality ratio

Goal 6. Combat HIV/AIDS, malaria and other diseases
- Target 7: Have halted by 2015 and begun to reverse the spread of HIV/AIDS
- Target 8: Have halted by 2015 and begun to reverse the incidence of malaria and other major diseases
ANNEX 2
SUPPLEMENTS

Note: This is provided to supplement the text with tools, survey questionnaires, and other materials that support the implementation of M&E in ICT for education. These documents and associated URLs are related to specific chapters in the Handbook, but are likely to be of broader and more up-to-date utility for the reader.

OVERVIEW

   A complete description of the UN Millennium Development Goals, which forms a blueprint agreed to by all the world’s countries and all the world’s leading development institutions to meet the needs of the world’s poorest.

2. ICT and MDGs: A World Bank Group Perspective (World Bank).
   This report illustrates the opportunities ICTs offer policy makers and practitioners in their efforts to achieve the MDGs and highlights selected World Bank-funded projects using ICT in accelerated development.

2. MONITORING AND EVALUATION OF ICT FOR EDUCATION IMPACT: A REVIEW

1. School Factors Related to Quality and Equity (OECD/PISA).
   A report on the effects of policies and the structure of education systems on educational outcomes, based on analyses of PISA 2000, the results of a multi-year, international study. The frameworks and assessment instruments from PISA 2000 were adopted by OECD member countries in December 1999. (see Annex A & B).
   http://www.pisa.oecd.org/document/35/0,2340,en_32252351_32236159_34669067_1_1_1_1,1-0.html last accessed October 16, 2005.

   An overview of a sample of M&E tools, methods, and approaches; including purpose and use; advantages and disadvantages; costs, skills, and time required; and key references.

2. CORE INDICATORS FOR MONITORING AND EVALUATION STUDIES FOR ICT FOR EDUCATION

1. Young Children's Computer Inventory Summary (Texas Center for Education Technology).
   A 52-item Likert instrument for measuring 1st through 3rd grade children's attitudes on seven major subscales. Also contains links to the survey instrument and scoring.

2. Tips for Preparing a Performance Evaluation (USAID).
   This document outlines USAID’s framework for performance monitoring plans (PMP) used to plan and manage the collection of performance data (and occasionally includes plans for data analysis, reporting, and use). It describes the following components as essential to PMPs: a detailed definition of each performance indicator; the source, method, frequency, and schedule of data collection; how the performance data will be analyzed; and how data will be reported, reviewed, and used to inform decisions.
   http://pdf.dec.org/pdf_/
3. DEVELOPING A MONITORING AND EVALUATION PLAN FOR ICT FOR EDUCATION

1. ICT Survey Questionnaire Summary (UNESCO-Bangkok).
   This instrument was developed with the understanding that many countries are at different stages of ICT development and, hence, indicators may vary. Questionnaires are meant to serve as a basis, and evaluations may tailor them to their specific contexts. The overall framework includes four questionnaires to be completed: ministry of education, school heads/principals, teachers & teaching staff, and students.

   ICDD provides advice and support to local organizations in developing countries to benefit from the potential of ICTs. This tool supports the collection of data and the analysis of results and includes surveys for project users, training & seminar participants, project team members & managers, information network members, and global teenager. http://testsurvey.iicd.org/ last accessed October 16, 2005.

   This contains online assessments for use by districts or schools to conduct online assessments of system-wide educational technology effectiveness. It includes sample surveys and profiles for educators, district & building administrators, district & building technology coordinators, board members, community members, students, and parents. http://www.ncrel.org/engauge/ assessment.htm last accessed October 16, 2005.

4. CAPACITY BUILDING AND MANAGEMENT IN ICT FOR EDUCATION

   An educator development program that focuses on integrated, formative assessment of practice and competencies on four levels: ICT skills, integration, growth in the educator as a professional, and the whole school. Some indicators of competencies include: levels of computer efficiency, practical, foundational, and reflective competencies, and self-assessment.
5. PRO-EQUITY APPROACHES TO MONITORING AND EVALUATION: GENDER, MARGINALIZED GROUPS AND SPECIAL NEEDS POPULATIONS

1. Advice on Special Education Needs (SEN) and Inclusion (National Grid for Learning).

   A web site promoting gender equity in the design, development, implementation, access to and use of ICTs and in the policy decisions and frameworks that regulate them. It offers information on activities/conferences, policy, evaluation, training, and resources. http://www.apcwomen.org last accessed October 16, 2005.

3. GenderIT.org
   A web site focusing on ICT contribution to the economic, political, and social empowerment of women and the promotion of gender equality, offering information on activities/conferences, policy, evaluation, training, clearing houses, and resources. The range of topics and accompanying resources include: economic empowerment, education, health, violence against women, women in armed conflict, cultural diversity and language, communication rights, universal access, strategic use and FOSS, and governance. http://www.genderit.org/en/index.shtml last accessed October 16, 2005.

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   With the goal of examining technology's impact on student achievement district-wide, this evaluation focuses on three steps: setting goals, collecting and analyzing data, and recommendations and reporting, with several sub-steps. http://www.sun-associates.com/3steps.pdf last accessed October 16, 2005.

   This Survey Toolkit is designed to collect experiential data about how computers and the Internet are being used around the world and in developing countries. The four surveys comprising this toolkit seek to address data deficits at both the school and policy levels, and give useful and actionable information about the integration of ICT in education. The four surveys are: teacher, student, head of school, and computer background. http://cyber.law.harvard.edu/ictsurvey/ICT_Computer-background-survey.pdf last accessed October 16, 2005.
ANNEX 3
AUTHOR BIOS

Bob Day directs the consulting firm Non-Zero-Sum Development (based in Pretoria, South Africa), and contributes to national, regional and international initiatives aimed at alleviating poverty and promoting socio-economic development throughout Africa (currently in Kenya, Uganda, Ethiopia, Ghana, Senegal, and Mozambique). He is involved in action research initiatives and policy development related to the Knowledge Society, ForeSight, Innovation, Knowledge Ecology and Organizational Transformation. He has consulted with a wide range of organizations, including UNESCO, UNDEP UNECA, IDRC, World Bank (InfoDev), Imfundo (DFID), IIL, CGIAR, ILRI, USAID, HSRC, as well as several private sector South African organizations. His most recent institutional post was with the University of South Africa (UNISA) from 01/2000 to 04/2003, as Executive Director of ICT.

Robert B. Koome is an Emeritus Director and Principal Scientist and Fulbright Senior Specialist at the Center for Technology in Learning at SRI International (Palo Alto, CA) and, previously, a professor of education at the University of Michigan. His expertise includes international educational technology research and policy, the evaluation of technology-based education reform, the design of advanced interactive multimedia systems, and the role of technology in science learning. He has directed or co-directed over 25 projects, authored or co-authored more than 60 articles, chapters, and books and consulted with Ministries of Education in Egypt, Singapore, Thailand, Norway, and Chile on the use of technology to improve educational systems and connect to development goals.

Tina James is a founder member of Trigrammic, a consultancy group based in South Africa. From 1997 - 2001 she was Programme Office and Senior Advisor to the Canadian International Development Research Centre’s Acacia Programme in Southern Africa. Previously she worked in various management positions for the South African Council for Scientific and Industrial Research (CSIR) and initiated the Information for Development Programme in the early 90s. She has more than twenty years experience on ICTs in Africa, including a review of the IT sector in South Africa for the President’s Office in 2004. She is the lead facilitator for an Africa-wide initiative on ICT policy advocacy for DFID (CATIA). She served on the ECAs African Technical Advisory Committee, and is presently an associate lecturer at the LINK Centre, University of the Witwatersrand on gender and ICTs.

Jonathan Miller is a founder member of Trigrammic, a consultancy group based in South Africa. For nearly 20 years, Miller was a senior faculty member of the University of Cape Town Graduate School of Business, where he taught and conducted research into ICT policy and practice. He gained his PhD in the definition and measurement of ICT-efficacy and has published over 20 refereed articles and many professional articles, book chapters and conference papers. His work has included ICT policy formulation in South Africa, Namibia, and the Eastern Caribbean States; E-readiness assessments in several African countries; assessment of ICT investment opportunities in East Africa; devising ICT funding programmes for the European Commission; and in South Africa: technology roadmapping, ICT diffusion studies, a major census of ICT firms, formulating policies for ICTs in SMEs and policies for Open Source. A Fellow and formerly President of the Computer Society of South Africa, he currently chairs the Board of the International Computer Driving Licence Foundation.

Bob Day directs the consulting firm Non-Zero-Sum Development (based in Pretoria, South Africa), and contributes to national, regional and international initiatives aimed at alleviating poverty and promoting socio-economic development throughout Africa (currently in Kenya, Uganda, Ethiopia, Ghana, Senegal, and Mozambique). He is involved in action research initiatives and policy development related to the Knowledge Society, ForeSight, Innovation, Knowledge Ecology and Organizational Transformation. He has consulted with a wide range of organizations, including UNESCO, UNDEP UNECA, IDRC, World Bank (InfoDev), Imfundo (DFID), IIL, CGIAR, ILRI, USAID, HSRC, as well as several private sector South African organizations. His most recent institutional post was with the University of South Africa (UNISA) from 01/2000 to 04/2003, as Executive Director of ICT.

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Tim Unwin is Professor of Geography at Royal Holloway, University of London, where he was formerly Head of Department. From 2001-2004 he led ‘Imfundo: Partnership for IT in Education’, a UK Prime Ministerial initiative designed to create partnerships that would use ICTs to support educational activities in Africa. Since returning to academia, he has created an ICT4D collective, doing research, teaching and consultancy in the field of ICT4D (http://www.ict4d.org.uk). He has undertaken research in some 25 countries, and is the author or editor of 13 books and over 150 academic papers or chapters in edited collections.

Daniel A. Wagner is Professor of Education and Director of the National Center on Adult Literacy at the University of Pennsylvania, which includes the federally-funded National Technology Laboratory for Literacy and Adult Education. He is also Director of the International Literacy Institute, co-founded by UNESCO and the University of Pennsylvania. His institutional website is: (http://www.literacy.org). Dr. Wagner received his Ph.D. in psychology at the University of Michigan, was a two-year postdoctoral fellow at Harvard University, a Visiting Fellow at the International Institute of Education Planning in Paris, a Visiting Professor at the University of Geneva (Switzerland), and a Fulbright Scholar at the University of Paris. Dr. Wagner has extensive experience in national and international educational issues. Along with numerous professional publications, Dr. Wagner has co-edited in recent years the following books: Literacy: An international handbook (1999); Learning to bridge the digital divide (2001); New technologies for literacy and adult education: A global review (2005).
About infoDev

infoDev is a partnership of international development agencies, coordinated and served by an expert Secretariat housed at the World Bank, one of its key donors and founders. It acts as a neutral convener of dialogue, and as a coordinator of joint action among bilateral and multilateral donors—supporting global sharing of information on ICT for development (ICT4D), and helping to reduce duplication of efforts and investments. infoDev also forms partnerships with public and private sector organizations who are innovators in the field of ICT4D.

For more information visit www.infodev.org or send an email to info@infodev.org.
This short handbook provides guidance for policymakers grappling with two key issues:

1. How should this impact be measured, and what are the related issues, especially as the relationship is understood and seen in the context of Education For All and other Millennium Development Goals?

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Topics:

- Monitoring and Evaluation of ICT4E: Overview
- Review of Monitoring and Evaluation Impact Studies
- Core Indicators for Monitoring and Evaluation Studies
- Developing a Monitoring and Evaluation Plan
- The Role of ICTs in Monitoring and Evaluation
- Gender, Marginalized Groups
- Pro-Equity Approaches to Monitoring and Evaluation
- Dos and Don'ts in Monitoring and Evaluation

A quick introduction and guide for busy policymakers and practitioners grappling with how to understand and assess the ICT-related investments underway in the education sector.