

PISA for Development

Expected results from the meeting



*2nd meeting of the International Advisory Group
OECD Conference Centre, Paris (France)
11-13 March 2015*

Expected results from the meeting

- Formal adoption of the Terms of Reference for the International Advisory Group (IAG) and election of two Co-Chairs
- Presentation and review of annual report on project activities, including an up-date on Strand C and the contribution of the OECD and the project to education in the post-2015 agenda
- Agreement of ToR for the PISA for Development TAG and up-date on the establishment of the TAG
- Presentation by OECD Secretariat and International Contractors of Statements of Work and integrated timeline for Strands A and B and approval of these by the IAG

Expected results from the meeting continued...

- Review and approval of the preparation of participating countries: capacity-building programmes and status of project implementation plans
- Presentation by Marlaine Lockheed of the first draft of the high level report on the experiences of non-OECD countries in PISA followed by discussion
- Presentation by UIS of the status of system level data in the participating countries and discussion of this.
- Presentation by ACER of the review of other assessment programmes and discussion of this.

Expected results from the meeting continued...

- Agreement of the ToR for an independent review of the project to be conducted in 2017/2018
- Formal adoption of the PISA for Development engagement and communication strategy
- Draft summary record and next steps agreed
- Participating countries oriented to the project implementation plan, key phases and instrumentation
- NPM mentoring and peer-to-peer learning initiated

Day One sessions

1. Introductions, Purpose of Meeting, Election of Co-Chairs, Approval of IAG ToRs and Project Progress Report
2. Discussion of the programme of work for Strands A and B
3. Preparation of participating countries: capacity building plans and project implementation plans for participating countries

Day Two sessions

4. Discussion of three expert papers
5. Terms of Reference for an independent review of the project in 2017-2018 and engagement and communication strategy
6. Next steps and meeting conclusion

Day Three sessions

7. Orientation to the key aspects of project implementation for participating countries
 - Overview of PISA-D roles, responsibilities and standards
 - Instrumentation
 - A PISA NPM perspective
 - Data Collection and Survey Operations
 - Scoring, Data Management, Analysis, and Data Products
 - Discussion and Next Steps

Key documents in folder

- Agenda
- Participants list
- ToR for International Advisory Group
- ToR for Technical Advisory Group
- Annual progress report
- Integrated timeline for Strands A and B
- Statement of Work for Strands A and B
- 1st draft of high-level report from Marlaine Lockheed
- 1st draft of system-level data paper from UIS
- 2nd draft of ACER review of other assessments
- ToR for independent review
- Draft engagement and communication strategy

Other documents in the room

- Project document with logframe
- Reports of capacity needs analysis for Ecuador; Guatemala; Senegal; and Zambia
- Capacity building plans for Ecuador; Guatemala; and Senegal
- Project Implementation Plans for Ecuador and Senegal
- Expert papers for Strands A, B and C
- Terms of Reference for Strand C
- PISA reports

IAG Agenda

- The International Advisory Group is invited to adopt the agenda for its second meeting

PISA for Development

Terms of Reference for the International Advisory Group (IAG)



*2nd meeting of the International Advisory Group
OECD Conference Centre, Paris (France)
11-13 March 2015*

International Advisory Group

Main Phases and Governance (PGB and DAC)

Partnership with and ownership by 6 participating countries



International Advisory Group

Technical Oversight
and Coordination
(including TAG and
SMEGs, QEGs)



International and
National
Implementation

International Advisory Group: ToR

- To provide substantive and strategic guidance to the project
- Membership
- Advisory Group Decisions
- Meetings and Chairpersons
- Secretariat

International Advisory Group: ToR

- The International Advisory Group is invited to formally adopt its Terms of Reference
- The International Advisory Group is invited to elect two co-chairs (participating countries and development partners)
- The International Advisory Group is invited to discuss the venue for its next three meetings (2016, 2017, 2018): Africa; Asia; and Latin America

PISA for Development

Terms of Reference for the Technical Advisory Group (TAG)



*2nd meeting of the International Advisory Group
OECD Conference Centre, Paris (France)
11-13 March 2015*

Technical Advisory Group (TAG)

- The PISA for Development TAG includes experts from the existing main PISA TAG and individuals who:
 - (i) have a leading operational role in the project; and
 - (ii) have expertise in technical areas not available from the main PISA TAG, such as NPM experience, experience surveying out-of-school youth, etc.
- The TAG will be managed by the OECD Secretariat in consultation with the IAG and PISA Governing Board
- TAG members are expected to attend meetings throughout the duration of the project (2015-2018):
 - (i) at least one face-to-face meeting of 1-2 days duration each year
 - (ii) ad-hoc meetings organised on the web or by teleconference

Key tasks and competencies

TAG members shall provide technical review and recommendations pertaining to:

- Overall programme design and implementation
- Enhancing PISA instruments
- Approaches to including out-of-school 15-year-olds
- Policy needs that the project can effectively meet
- Finalisation and use of the PISA database
- Situational deviations from standards based on what is realistic and feasible in the participating countries

TAG-related activities & responsibilities

Task	TAG	Contractors	Secretariat
Prepare an Agenda	X	X	XX
Organise TAG Papers			XX
Draft TAG Papers	XX	XX	XX
Format TAG Papers			XX
Organise TAG Meetings			XX
Participate in TAG Meetings	XX	X	XX
Summary Records of TAG Meetings	X		XX
Provide feedback from TAG to Contractors			XX
Liaise between PGB, IAG, and TAG			XX
Maintain TAG Papers and Records on project's web-based platform			XX

XX: Main responsibility; X: Supporting responsibility

PISA for Development TAG Members

- Keith Rust (Chair) Westat, USA
- Kentaro Yamamoto ETS, USA
- John de Jong Pearson, UK/VU University Amsterdam, NLD
- Christian Monseur Université de Liège, BEL
- Thierry Rocher Ministère de l'Éducation National, FRA
- Cees Glas University of Twente, NLD
- Irwin Kirsch ETS, USA
- Margaret Wu Victoria University, AUS
- Theo Eggen Cito, NLD
- Marit Kjaernsli University of Oslo, NOR

Technical Advisory Group: ToR

- The International Advisory Group is invited to formally adopt the Terms of Reference for the TAG

PISA for Development

Annual report on project activities



*2nd meeting of the International Advisory Group
OECD Conference Centre, Paris (France)
11-13 March 2015*

Annual report format

From 2015 onwards, a progress report:

- actual outputs compared to planned outputs
- summary of the use of funds compared to budget,
- explanation of major deviations from plans,
- assessment of problems and risks,
- assessment of the need for adjustments to activity plans and/or inputs and outputs, including actions for risk mitigation,
- assessment of achievements in relation to project purpose

12 next steps agreed upon at 1st IAG

1. OECD to complete the remaining planned expert papers and hold third technical workshop (Out-of-School 15-year-olds)
2. OECD to prepare ToR and tendering documents for international contractor(s) and to finalise these in consultation with the IAG members
3. OECD to sign participation agreements with all the countries participating in the project
4. Participating countries to nominate National Centres and National Project Managers and to prepare project implementation plans
5. Participating countries to finalise agreements with development partners regarding contributions and support (e.g. international costs, in-country costs and activities) and to finalise in-country budgets
6. OECD to complete capacity needs analysis and to design capacity-building programmes for all participating countries

12 next steps agreed upon at 1st IAG

7. OECD to finalise with development partners outstanding agreements for support to the project – general contributions and country-specific contributions
8. OECD to confirm with other agencies arrangements for technical partnerships and collaboration
9. OECD to consult with IAG members on the ToR and membership of the TAG and the draft engagement and communication strategy
10. OECD to complete tendering process to commission international contractor(s)
11. First meeting of Technical Advisory Group after awarding of international contract
12. OECD Project implementation: design, planning and coordination (including capacity assessment and capacity building planning for participating countries); technical development; field trials and main data collection; analysis and reporting; post-pilot governance

12 next steps agreed upon at 1st IAG



Step One:

- OECD to complete the remaining planned expert papers and
- hold third technical workshop (Out-of-School 15-year-olds)

Expert papers (i): review of other assessment programmes



Literacy Assessment and Monitoring Programme (LAMP)

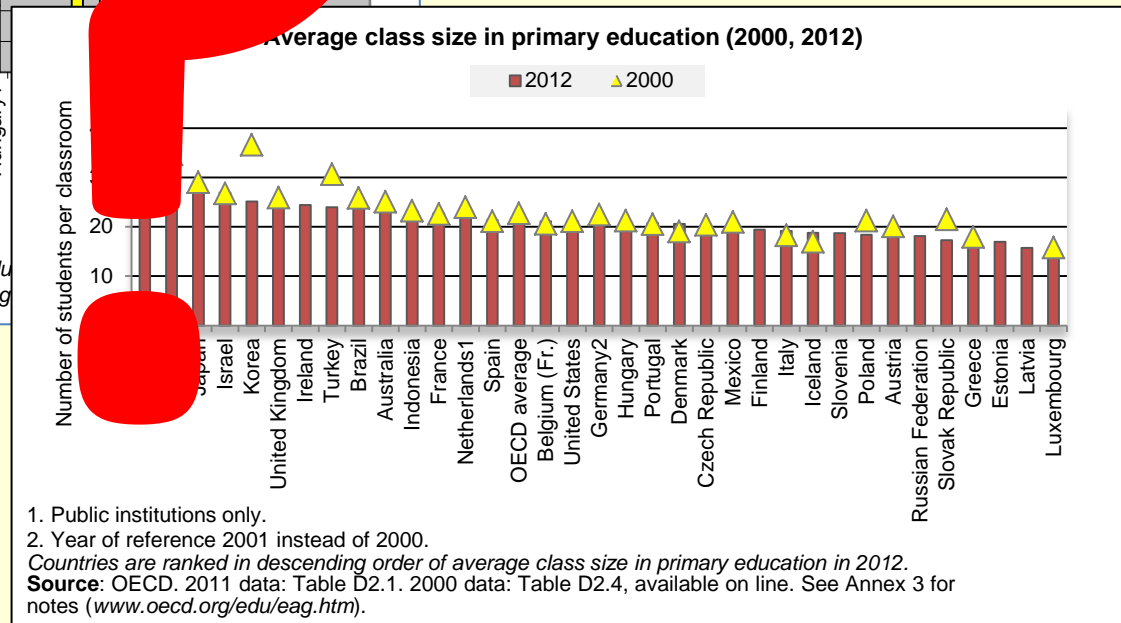
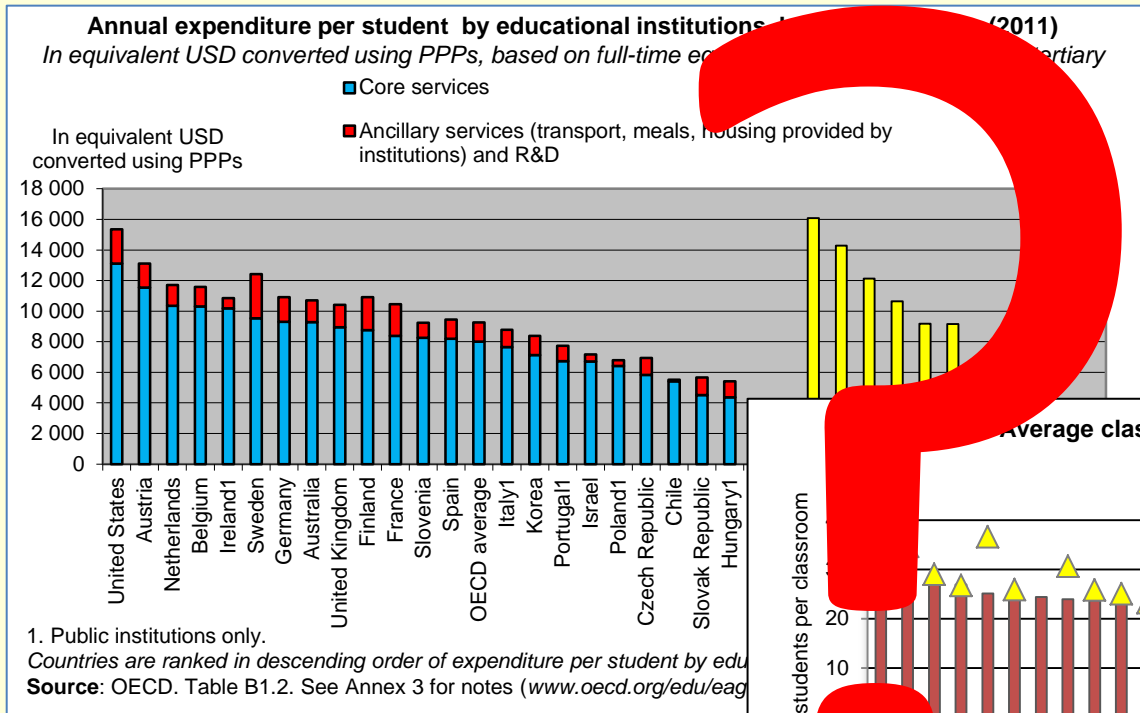


WEI SURVEY OF PRIMARY SCHOOLS

OECD Survey of Adult Skills (PIAAC)



Expert papers(ii): review of system level data in the participating countries



Expert papers (iii): high level report on the experiences of non-OECD countries in PISA

The report will develop & explore a set of working hypotheses, addressing the following issues:

Drivers of Participation

Financial & technical challenges

Capacity-building outcomes

Results/
frameworks
use

Policy impact

Key lessons for OECD and LMI countries

Expert papers (iv): The 10 indicators that have the most impact on learning in middle income countries

- Explores PISA results of middle income countries to identify indicators with the most impact on learning in those contexts
 - E.g., quality & style of instruction; accountability; curriculum coverage; appropriate level of instruction; maths & reading time; number of courses in reading & maths; student interest in reading & maths; relevance of reading & maths to students; school resources; class size; student absenteeism & sense of belonging; teacher-student relationship; classroom disciplinary climate; & school safety
- Will provide a set of recommendations on how to enhance PISA tools to make these more relevant to middle income and developing country contexts

Expert papers (v): including out-of-school 15 year olds in data collection and assessment

- Explores the main technical issues and challenges facing the project in Strand C among the countries committed to participation, their development partners and the other agencies with whom OECD is forging technical partnerships
- Provides a set of recommendations on how to include out-of-school 15 year olds in data collection and assessment
- Has informed the technical workshop in Montreal, October 2014 and the development of ToR for Strand C

3rd Technical Workshop: Out-of-School 15-year-olds

1-2 October 2014 at UIS, Université de Montreal, Canada

The meeting achieved its expected results, which were:

1. to reach a common understanding of the main technical issues and challenges facing the project in Strand C among the countries committed to participation, their development partners and the other agencies with whom OECD is forging technical partnerships;
2. to identify relevant options for addressing these challenges, especially in relation to further development of the expert paper, more information needed to be considered by the OECD for the project, and the finalisation of the components of the Terms of Reference for the International Contractor(s); and
3. to set out next steps by the OECD and its partners for the preparation of the call for tender for Strand C.

Step two: ToR for International Contractors

Strand A – enhancement of PISA’s cognitive instruments

Strand B – enhancement of PISA’s contextual questionnaires

- OECD finalised the ToR and related tendering documents, incorporating all IAG & PISA SDG feedback received by July 2014, and launched the call for tender at the beginning of August 2014 – Statements of Work finalised January 2015

Strand C – developing a methodology and an approach for incorporating out-of-school 15 year-olds

- OECD has finalised the ToR and related tendering documents, incorporating all IAG, PISA SDG & PIAAC feedback received, and will launch the call for tender in March 2015

Step Three: Participation agreements signed with all participating countries



Countries that have signed participation agreements with the OECD:

- **Ecuador, Guatemala, Senegal, Zambia**

Countries finalising participation agreements with the OECD with a view to signing these by 21 April and 31 May 2015:

- **Paraguay (launch 21 April); Cambodia**

Step Four: NCs, NPMs and PIPs



- A National Centre (NC) has been identified and a National Project Manager (NPM) appointed to manage implementation in Ecuador; Guatemala; Paraguay; Senegal; and Zambia
- Project Implementation Plans (PIP) prepared for Ecuador; Guatemala; Senegal; and Zambia – Paraguay ready by 21 April 2015; Cambodia by 31 May 2015

Step Five: Countries to finalise agreements with development partners



- Completed or almost completed for Ecuador; Guatemala; Paraguay; Senegal; and Zambia
- Financing issues to resolve for Cambodia

Step six: preparing participating countries for project implementation



- Capacity needs analysis completed for **Cambodia, Ecuador, Guatemala, Senegal, Tanzania & Zambia**; under way for **Paraguay**.
- Capacity building plans produced for **Cambodia, Ecuador, Guatemala, Senegal & Zambia**; under way for **Paraguay**. All to be completed by April 2015.
- PIPs in place for **Cambodia, Ecuador, Guatemala, Paraguay, Senegal, & Zambia** by April 2015

Steps 7&8: Partners in the project

Development Partners

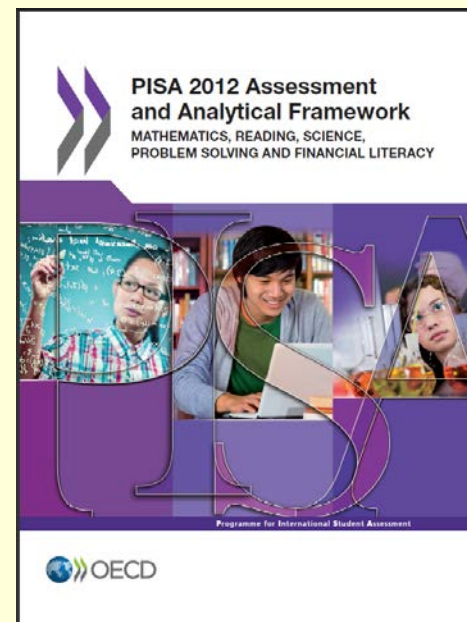
- France (*AFD*)
- Germany (BMZ/GIZ)
- Ireland (Irish Aid)
- Japan (JICA)
- Korea
- Norway (Norad)
- United Kingdom (DFID)
- Inter-American Development Bank
- The Global Partnership for Education (GPE), through the World Bank
- World Bank (READ and countries)

Technical Partners

- UNESCO
- UNESCO Institute of Statistics (UIS)
- Education For All Global Monitoring Report (EFA GMR) team
- UNICEF
- And the following assessment programmes: ASER; EGRA; EGMA; SACMEQ; PASEC; Pre-PIRLS and PIRLS; TIMSS; LLECE; STEP; LAMP; UWEZO; and WEI-SPS
- Education International
- PISA SDG, PIAAC team

Step 9a: PISA for Development TAG

- Will make use of existing PISA TAG, supplemented by experts with developing country expertise & experience & NPM experience
- TAG will be managed by the OECD Secretariat



Step 9b: Engagement & communication

- Draft *Engagement and Communication Strategy* was circulated to IAG members in May 2014
- Feedback has been incorporated, and the IAG is asked to endorse the draft at this meeting
- Next step: OECD to begin implementing the strategy in collaboration with the communications teams in each participating country in support of the achievement of the project's objectives

Step 10: tendering process for International Contractors

Strand A – enhancement of PISA’s cognitive instruments

- Contract awarded to *Educational Testing Service* (ETS)

Strand B – enhancement of PISA’s contextual questionnaires

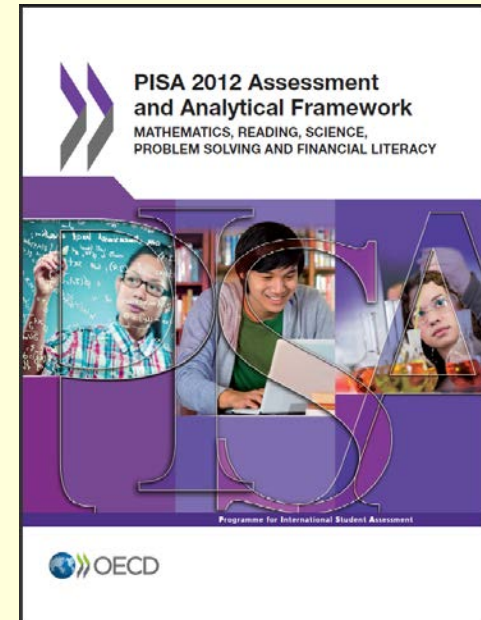
- Contract awarded to *The Learning Bar* (TLB)

Strand C – developing a methodology and an approach for incorporating out-of-school 15 year-olds

- A call for tender will be launched in March 2015 with an aim to complete the tendering process and sign a contract by 31 July 2015

Step 11: First meeting of the PISA for Development TAG

- 1st meeting of TAG a webinar in August 2015 with a focus on the frameworks for the cognitive assessment and contextual questionnaires



Education SDG Post-2015: Quality with equity

Post-2015 education targets focus on quality with **equity** will require use of surveys that capture individual characteristics, e.g. gender, location and socioeconomic status.

- PISA can help: PISA as a potential metric for measuring progress towards a learning goal in the context of the post-2015 agenda
- OECD contributions to OWG; EFA Steering Committee; EFA SC TAG; EFA regional consultations; LMTF; LMP; World Education Forum, Incheon, Korea, 19-22 May 2015

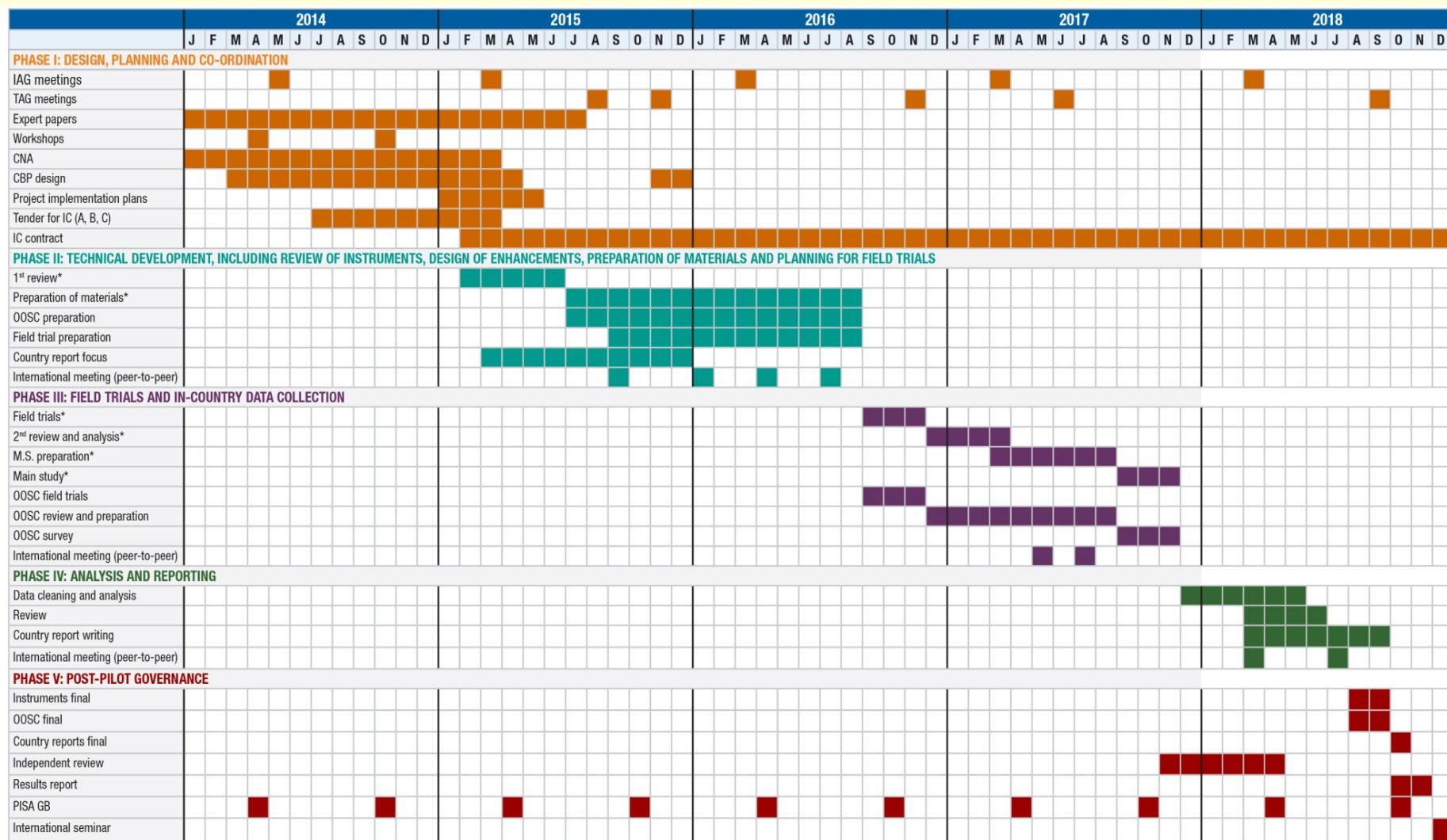
PISA for Development use of funds

Expenditure Analysis (EUR)	Project Budget	Expenditures	Commitments				Total 5 years
		2014 Y1	2015 Y2	2016 Y3	2017 Y4	2018 Y5	
A1. International Advisory Group	261 000	129 205	35 000	35 000	31 000	30 795	261 000
A2. Instrument development, field trials, local assessment implementation and related services	2 656 300	37 272	700 000	700 000	700 000	700 000	2 837 272
A3. Technical oversight, coordination, analysis and reporting	1 180 336	337 902	382 000	395 000	408 000	421 000	1 943 902
A4. Engagement for peer-to-peer learning and contribution to UN-led post-2015 process	186 466	17 413	84 680	42 000	42 746		186 839
Overhead	288 046						288 046
Total	4 572 148						5 517 059

Challenges, risks and assumptions

1. The institutional, technical and administrative capacity and conditions that are needed to successfully implement PISA at country and sub-national levels – risks low
2. The technical challenges are many and various and relate to the central question of how far PISA for Development can go in enhancing and adapting PISA to be more relevant to developing countries while still ensuring that the results of the assessment contribute to the establishment of an international benchmark in the context of PISA – risks are manageable
3. PISA is changing rapidly and PISA for Development needs to ensure that it provides an effective bridge for developing countries into main PISA – risks low

Adjustments: Project Implementation Schedule to 2018



*contextual questionnaires and cognitive instruments for students in school only

Brief assessment of achievements

- The project plan for 2014 has been implemented in accordance with the 12 next steps agreed upon at the 1st IAG meeting. There have been no major deviations.
- All activities completed in 2014 and reported on are contributing directly to the project's 5 outputs.
- The necessary conditions for the achievement of the project purpose will be established by 2018.
 - Increased numbers of developing countries use PISA assessments from 2021 onwards to monitor progress towards national improvement targets, to comparatively analyse factors associated with student outcomes, for institutional capacity-building and for tracking international education targets within a post-2015 SDG framework.

Annual Report on Progress

The International Advisory Group is invited to:

- Note the progress that has been made since May 2014
- Discuss any issues arising from the progress report
- Approve the annual report on progress

PISA for Development

Project management, cognitive instruments and contextual questionnaires

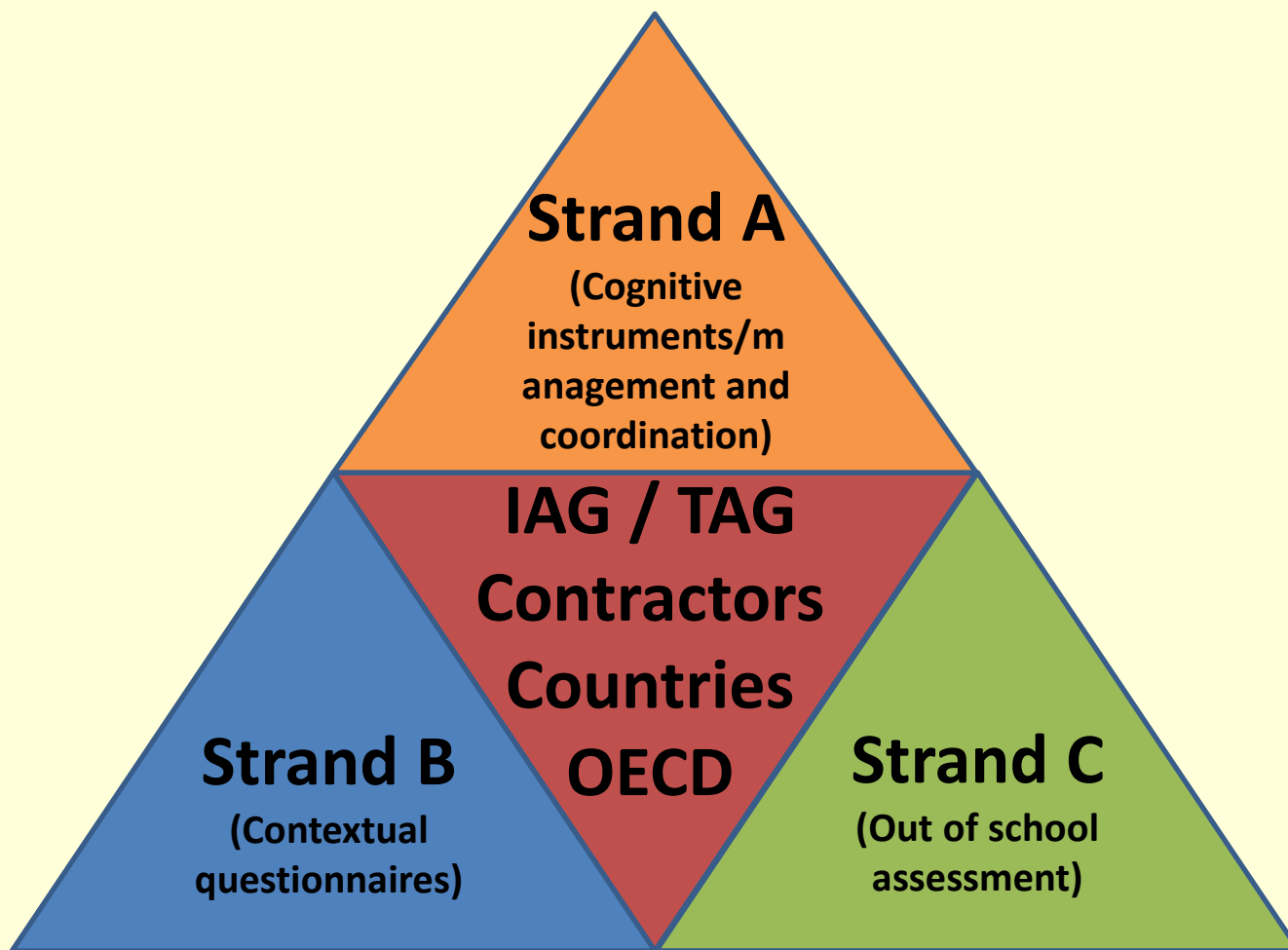


*2nd meeting of the International Advisory Group
OECD Conference Centre, Paris (France)
11-13 March 2015*

PISA for Development: How far can PISA go?

- A. Can we improve the relevance, quality and reliability of performance measurement?
 - Establishing measures that work in a wider range of countries
- B. Can we develop a framework that embraces the diversity of contexts in which students learn, teachers teach and school systems operate?
 - Comparable to facilitate peer-learning
 - Country-specific to be meaningful and interpretable in national contexts
- C. Can we extend measurement to children not enrolled in formal education?
 - Establishing policy-incentives for inclusiveness

Partnership structure of PISA-D



Tendering process for International Contractors

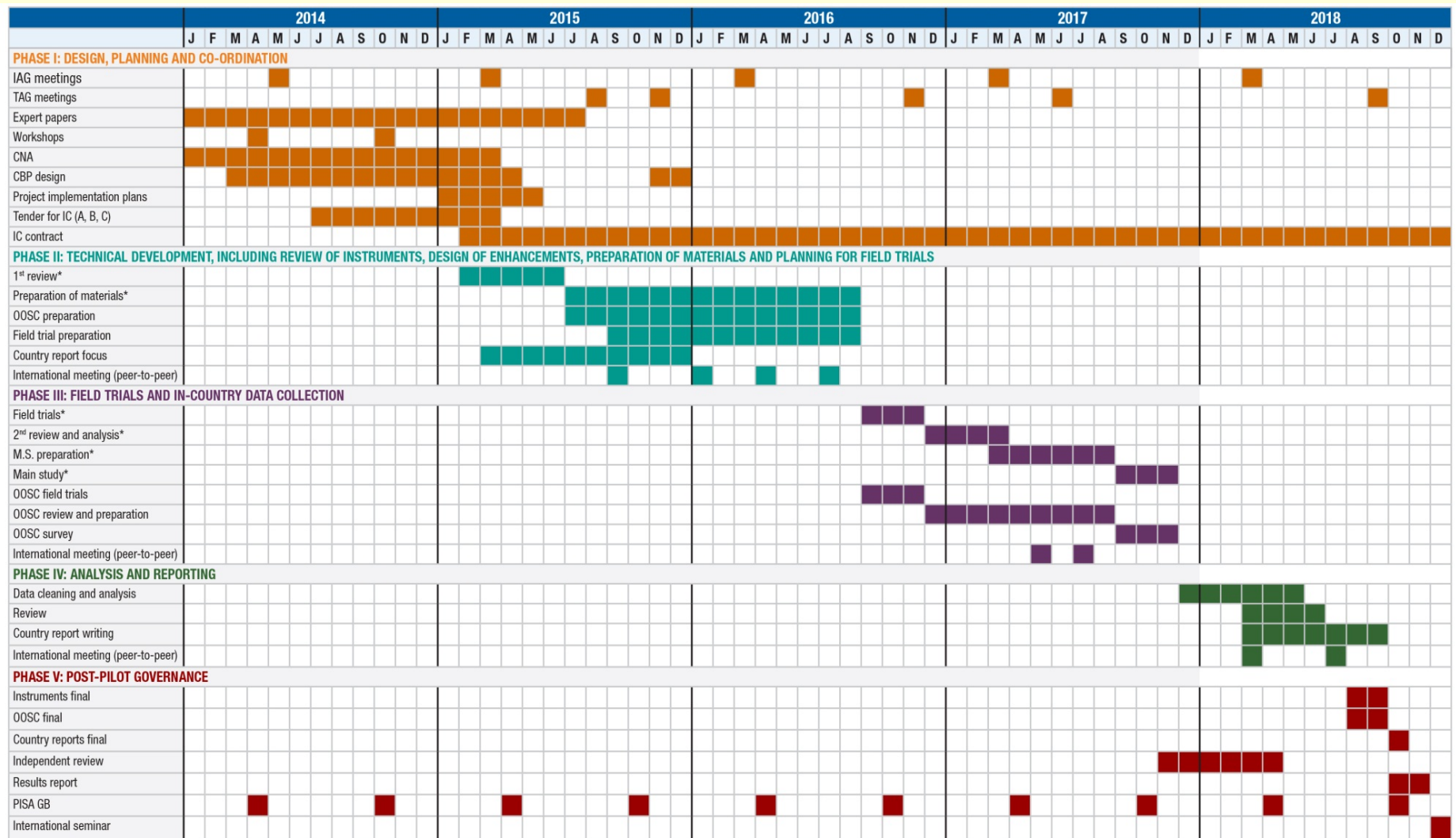
Strand A – enhancement of PISA’s cognitive instruments

- Contract awarded to *Educational Testing Service (ETS)*

Strand B – enhancement of PISA’s contextual questionnaires

- Contract awarded to *The Learning Bar (TLB)*

Project Implementation Schedule



*contextual questionnaires and cognitive instruments for students in school only

Annual Report on Progress

The International Advisory Group is invited to:

- Note the project implementation schedule
- Discuss any issues arising from the planned project management, development and implementation

PISA

for Development

PISA for Development Implementation Structure and Project Timeline

PISA for Development IAG Meeting

11 March 2015

Paris, France

Strand A: ETS

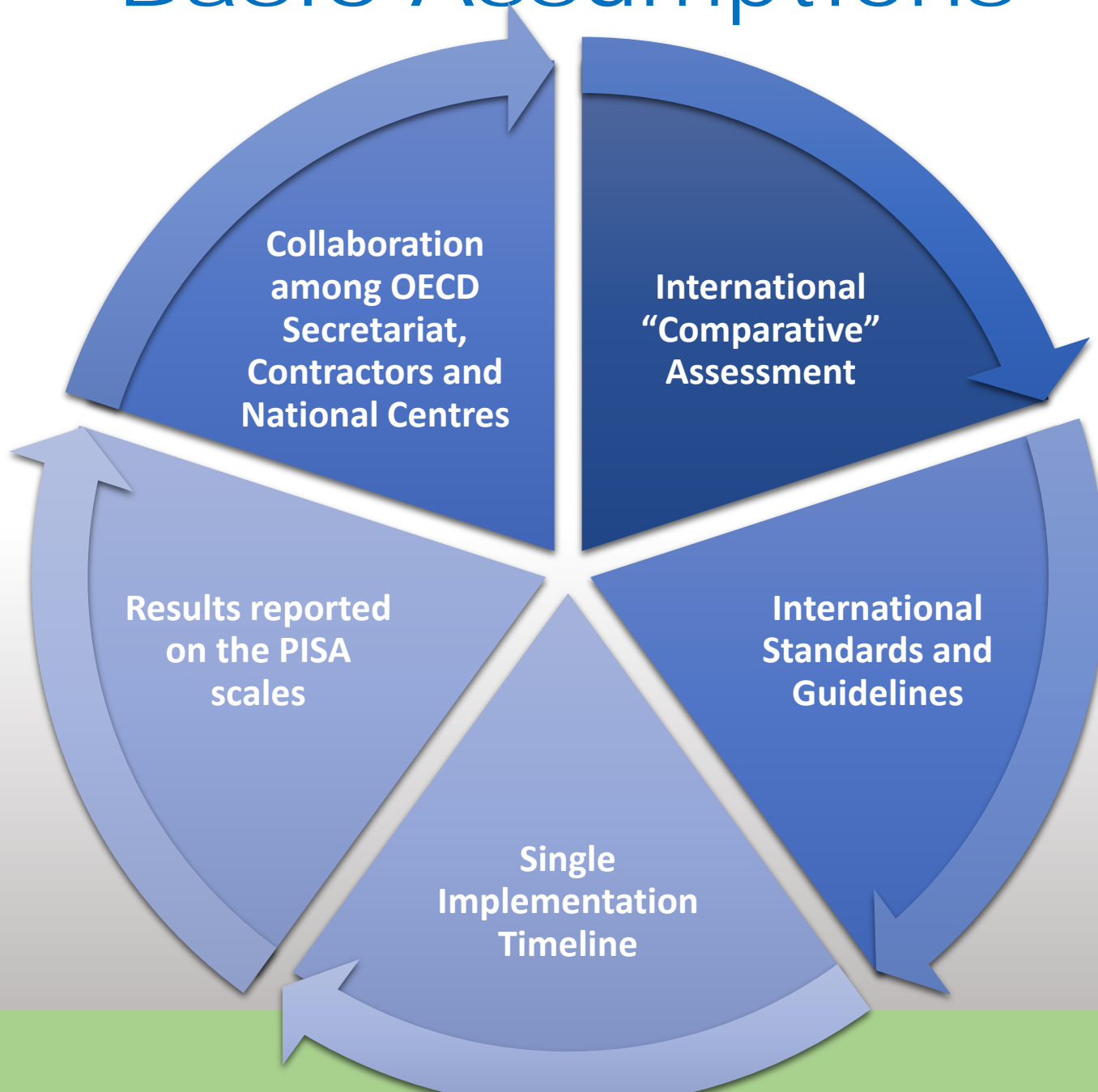
Claudia Tamassia



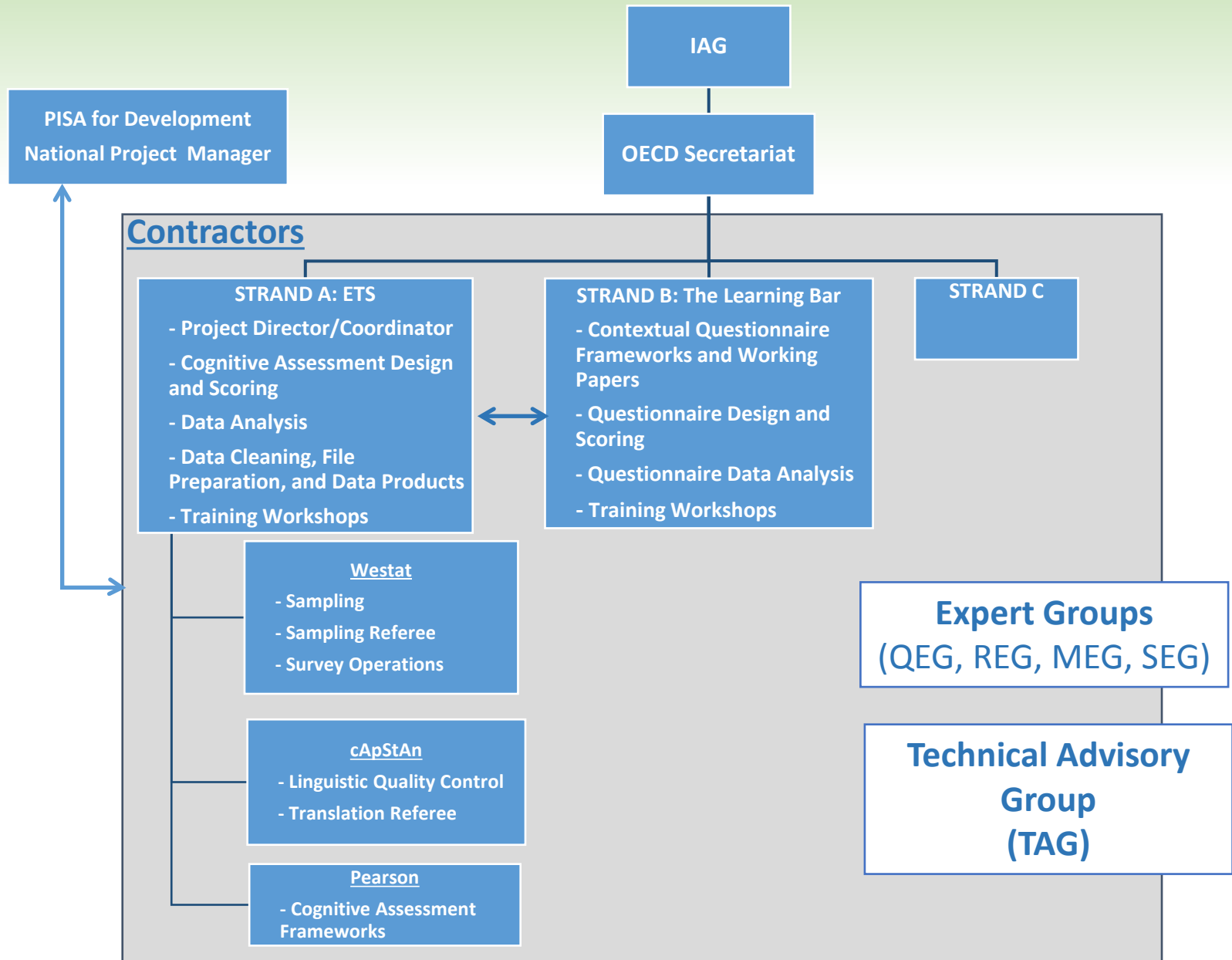
Overview

- Basic assumptions
- Implementation structure
- Overview of project timeline
- Key activities and NPM meetings
- Questions and discussion

Basic Assumptions



Implementation Structure



Implementation Structure

National Project Manager (NPM)

- Oversees all national tasks related to the development and implementation of PISA-D
- Monitors or implements activities in all areas, in particular:
 - Sampling
 - Instrument review
 - Translation and adaptation of instruments
 - Survey operations
 - Coding
 - Data management
 - National report planning and dissemination

Implementation Structure

Profile of National Project Managers

- Oral and written communication skills in English
- Experience in planning, organizing and conducting large-scale surveys
- Familiarity with a variety of areas including statistics, sampling, survey procedures and data management, procedures and analysis
- Experience with Microsoft applications such as Word and Excel
- Knowledge of and experience dealing with government agencies, school principals, parents and teachers within their own countries

Overview of Project Timeline

<u>Phase 1</u> Finalizing the design and materials for the Field Trial (FT)	February— November 2015
<u>Phase 2</u> Preparing for and carrying out the FT	November 2015— March 2017
<u>Phase 3</u> Analyzing FT data, preparing for and carrying out the Main Study (MS)	March 2017— February 2018
<u>Phase 4</u> Analyzing MS data and preparing for reporting and dissemination	February— December 2018

Key Activities and NPM Meetings

Phase 1

<u>Phase 1</u> Finalizing the design and materials for the Field Trial (FT)	Responsibility	Months
Project Initiation and framework development	Contractors	Feb.—Aug. 2015
First NPM meeting: <i>Review draft cognitive and contextual assessment frameworks and characteristics of the available item pools; capacity building activities around item development and selection</i>	Contractors and Countries	Sept. 2015
Finalize FT assessment instruments and questionnaires	Contractors	Nov. 2015

Key Activities and NPM Meetings: Phase 2

<u>Phase 2</u> Preparing for and carrying out the FT	Responsibility	Months
Preparation of materials for translation and adaptation	Contractors	Nov.—Dec. 2015
Second NPM meeting: <i>Adaptation and translation training of all survey materials, and verification and sampling overview</i>	Contractors and Countries	Jan. 2016
FT sampling tasks	Contractors and Countries	Jan.—June 2016
Translation and adaptation of assessment materials coding guides and questionnaires	Countries	Feb.—April 2016
Verification of assessment materials, coding guides and questionnaires	Contractors	May – June 2016
Prepare FT training materials	Contractors and Countries	Feb.—Aug. 2016
Third NPM meeting: <i>Student sampling, FT survey operations, and test administrator training</i>	Contractors and Countries	April 2016
Assembly of national FT assessment instruments and questionnaires	Contractors and Countries	June-Aug. 2016

Key Activities and NPM Meetings: Phase 2

<u>Phase 2</u> Preparing for and carrying out the FT	Responsibility	Months
Fourth NPM meeting: <i>Scoring training for open-constructed response items and data management training</i>	Contractors and Countries	July 2016
FT National Training	Countries	Aug. 2016
FT Administration	Countries	Sept.—Nov. 2016
FT national scoring and data file preparation and submission	Countries	Dec. 2016—Mar. 2017

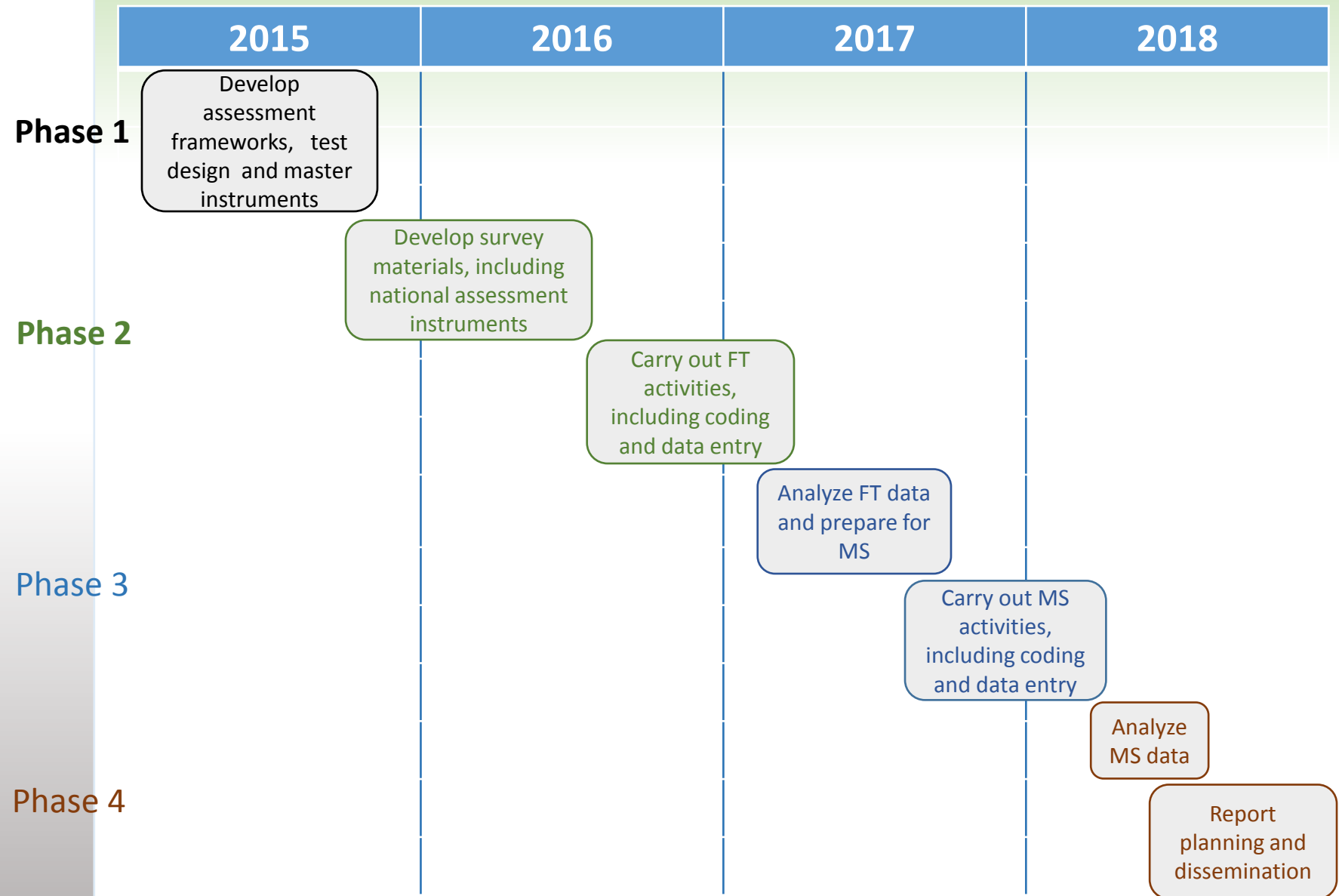
Key Activities and NPM Meetings: Phase 3

Phase 3 Analyzing FT data, preparing for and carrying out the Main Study (MS)	Responsibility	Months
MS school sampling activities	Contractors and Countries	Dec. 2016—June 2017
FT data analysis	Contractors	Mar.—May 2017
Fifth NPM meeting: <i>Analysis and interpretation of FT results, plans for analysis of contextual questionnaires, and preparation for MS data collection</i>	Contractors and Countries	May 2017
Finalize and assemble MS assessment instruments and questionnaires	Contractors and Countries	May—July 2017
Sixth NPM meeting: <i>MS survey operations, MS student sampling, and test administrator, scoring, and data management training</i>	Contractors and Countries	July 2017
MS National Training	Countries	Aug. 2017
MS Administration	Countries	Sept.—Dec. 2017
MS scoring and data file preparation and submission	Countries	Dec. 2017—Mar. 2018

Key Activities and NPM Meetings: Phase 4

Phase 4 Analyzing MS data and preparing for reporting and dissemination	Responsibility	Months
MS international data cleaning and data file preparation	Contractors (and Countries)	Feb.—Mar. 2018
Seventh NPM meeting: <i>Scaling methodology, and data analysis and reporting tools</i>	Contractors and Countries	March 2018
MS data analysis	Contractors	Mar—May 2018
Preparation of draft international database	Contractors	June 2018
Eighth NPM meeting: <i>Analysis and interpretation of MS results and preparations for reporting and dissemination</i>	Contractors and Countries	July 2018
Report preparations	OECD and Countries	July—Nov. 2018
Official release of PISA-D results and data products	OECD, Contractors and Countries	Dec. 2018

Summary



Questions and Discussion

PISA

for Development

Enhancing PISA's contextual questionnaires

J. Douglas Willms

Robert Laurie



Overview

- The Learning Bar
- Questionnaire Expert Group (QEG)
- Overview of PISA-D milestones
- Research Papers
- Working Papers
- Questionnaires
- TLB PISA-D milestones 2015
- TLB PISA-D milestones 2016-2018
- Questions and Discussion

The Learning Bar

PISA-D team members

- J. Douglas Willms – team leader
- Robert Laurie – project director
- Lucia Tramonte – researcher
- Alma Lopez – researcher
- Danielle Durepos – researcher

Questionnaire Expert Group (QEG)

Members have collective expertise in:

- Poverty issues
- Education in Latin American countries
- Education in African countries
- Education in South-East Asian countries
- Current PISA QEG membership

- Andres Peri (Uruguay) – Chair of PISA-D QEG

Research Papers

Research Paper 1: Student achievement in low- and middle-income PISA 2009 partner countries.

Research Paper 2: Measuring poverty related to students' educational attainment in low- middle-income countries.

Research Paper 3: A framework for assessing school resources in low- and middle-income countries.

Research Paper 4: The content of national reports on student competencies.

Working Papers

- Working Paper 1:** Project management for Strand B implementation. (This presentation and timeline presented to OECD Secretariat)
- Working Paper 2:** Analytical framework for PISA-D questionnaires.
- Working Paper 3:** Design and composition of contextual questionnaires.
- Working Paper 4:** Analysis plan for contextual questionnaires.
- Working Paper 5:** Contributions to PISA-D technical report and documented data product.

Questionnaires

Questionnaire 1: Field trial questionnaires

Questionnaire 2: Main study questionnaires

Questionnaire 3: Data cleaning and analysis specifications

2015 milestones

<u>Research Papers</u>			1	1		2 3						4
<u>Working Papers</u>		1				2 3	QEG		QEG			
<u>Questionnaires</u>									1			1
	J	F	M	A	M	J	J	A	S 1	O	N	D
	2015											

2016 milestones

<u>Research Papers</u>												
<u>Working Papers</u>							4 <i>a</i>					4 <i>b</i>
<u>Questionnaires</u>												
	J 2	F	M	A 3	M	J	J 4	A	S	O	N	D
	2016											

2017 milestones

<u>Research Papers</u>												
<u>Working Papers</u>	2 3		4	QEG								
<u>Questionnaires</u>					2	2					3	
	J	F	M	A	M 5	J	J 6	A	S	O	N	D
	2017											

2018 milestones

<u>Research Papers</u>												
<u>Working Papers</u>		4					5					
<u>Questionnaires</u>												
	J	F	M 7	A	M	J	J 8	A	S	O	N	D
	2018											

Questions and Discussion

PISA for Development

Preparation of Countries



*2nd meeting of the International Advisory Group
OECD Conference Centre, Paris (France)
11-13 March 2015*

Preparing participating countries for project implementation



- Capacity needs analysis completed for **Ecuador, Guatemala, Senegal, Tanzania & Zambia**; under way for **Cambodia & Paraguay**.
- Capacity building plans produced for **Cambodia, Ecuador, Guatemala, Senegal & Zambia**; under way for **Paraguay**. All to be completed by April 2015.

Building on experience: Peer-to-peer learning



- Peer-to-peer learning events (seminars & workshops)
- NPM-NPM mentoring
- Participation in international/NPM meetings
- Case studies

PISA for Development

Needs assessment, Capacity building and Program
implementation planning

Fernando Cartwright

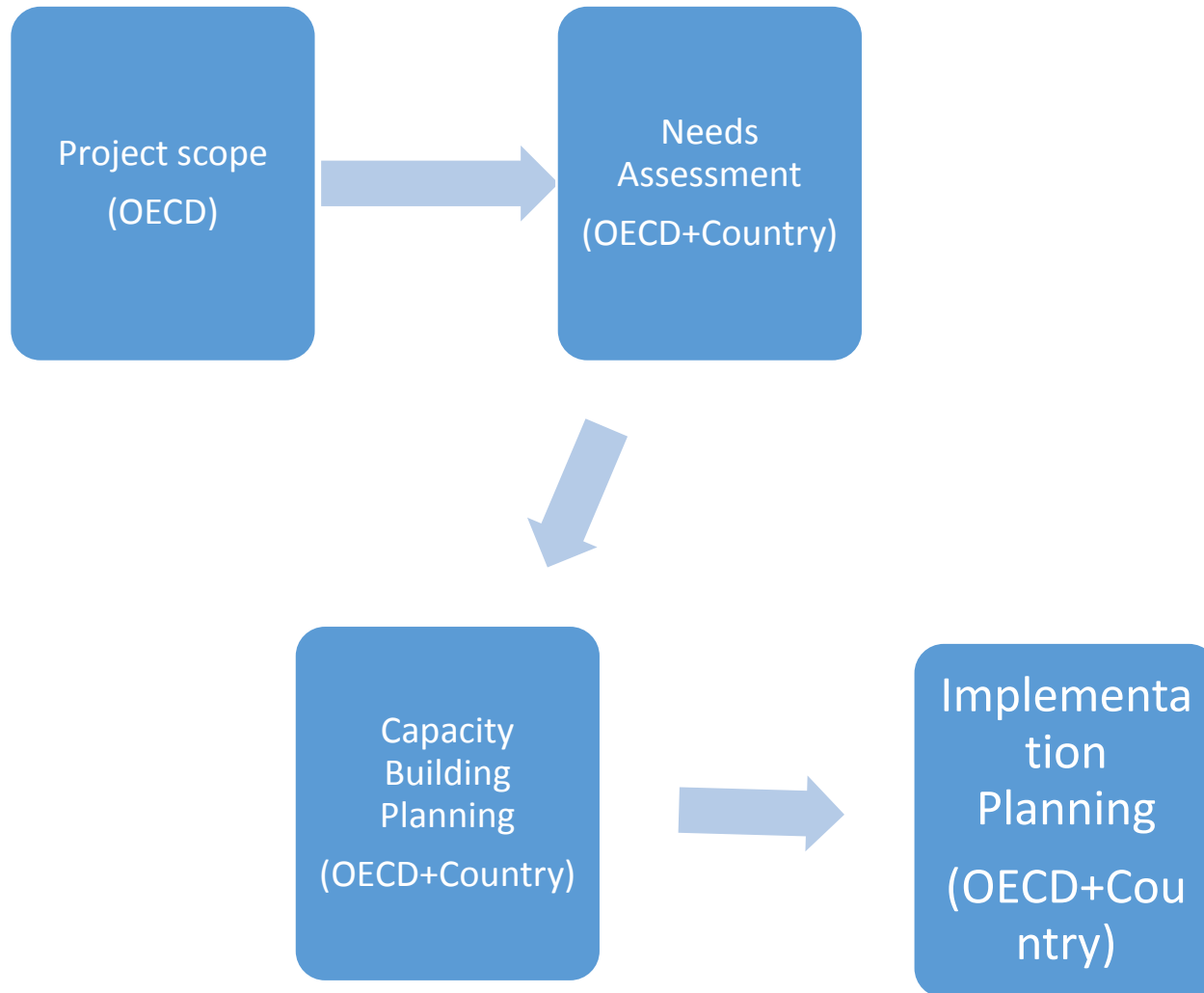
Overview

1. Key factors that affect planning
2. The process thus far
3. Moving towards a sustainable strategy

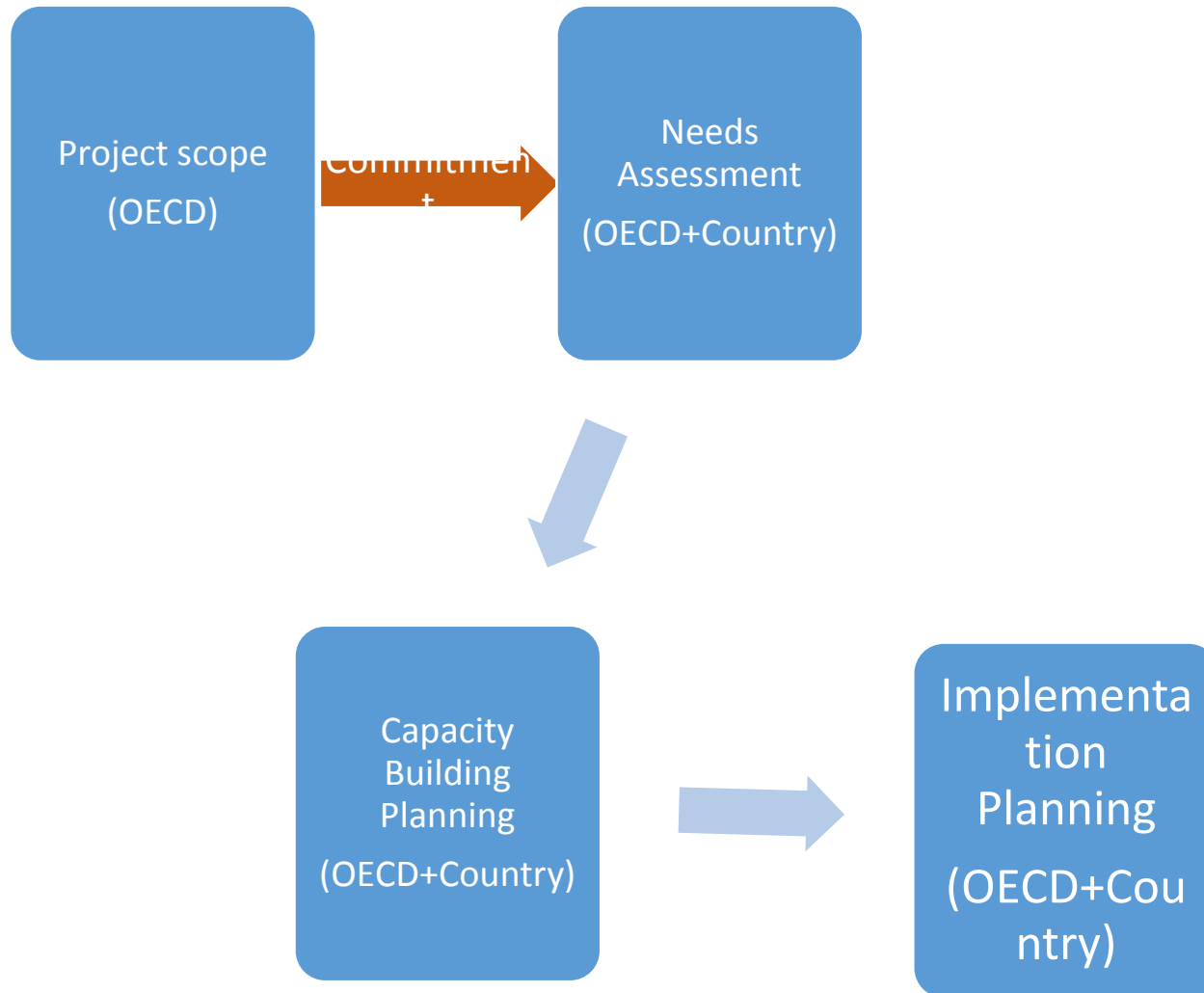
Complicating factors

- Multiple agents
- Multiple interests
- Variable scope
- Varying timelines

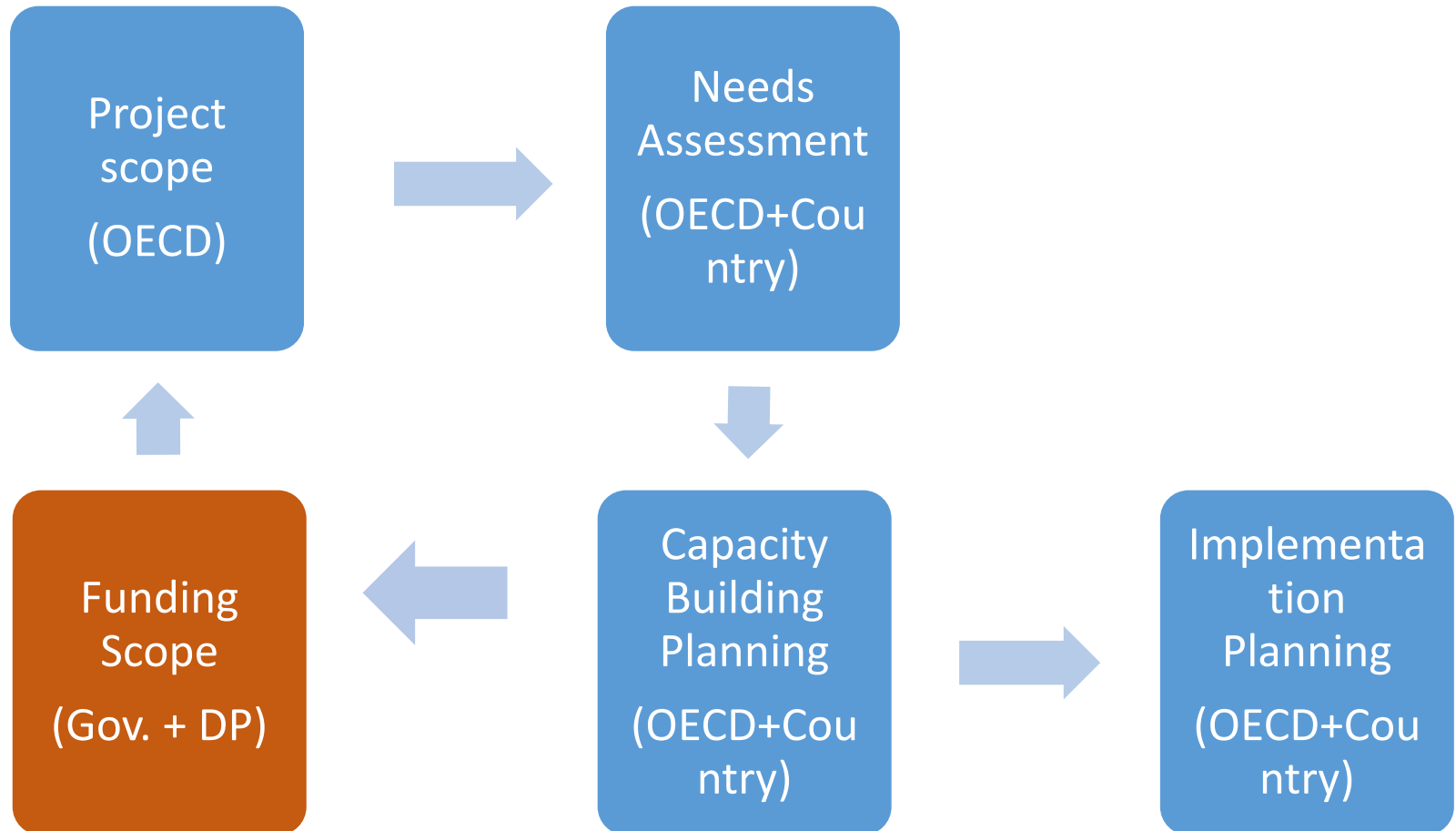
Initial Model



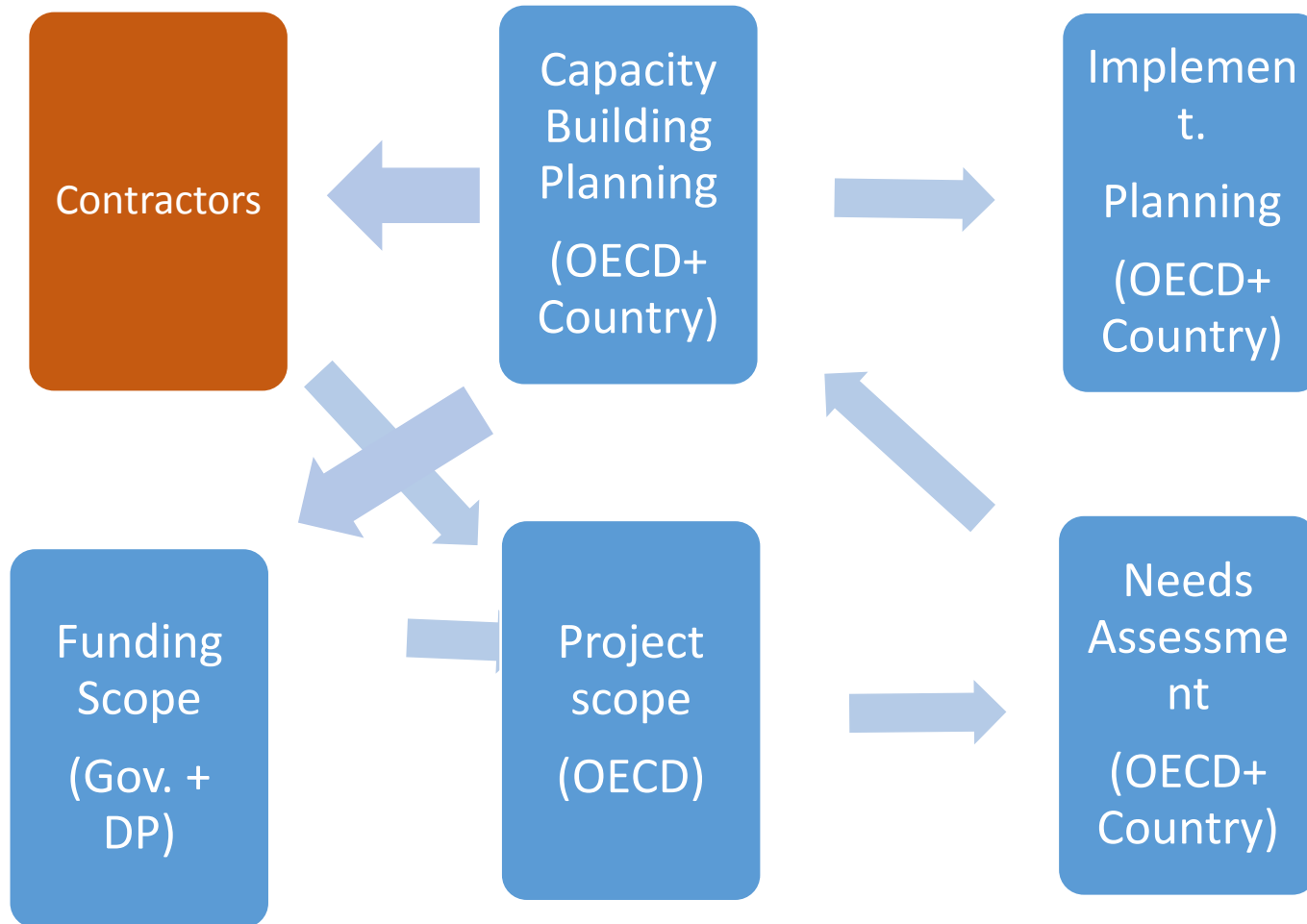
Interest vs. Commitment



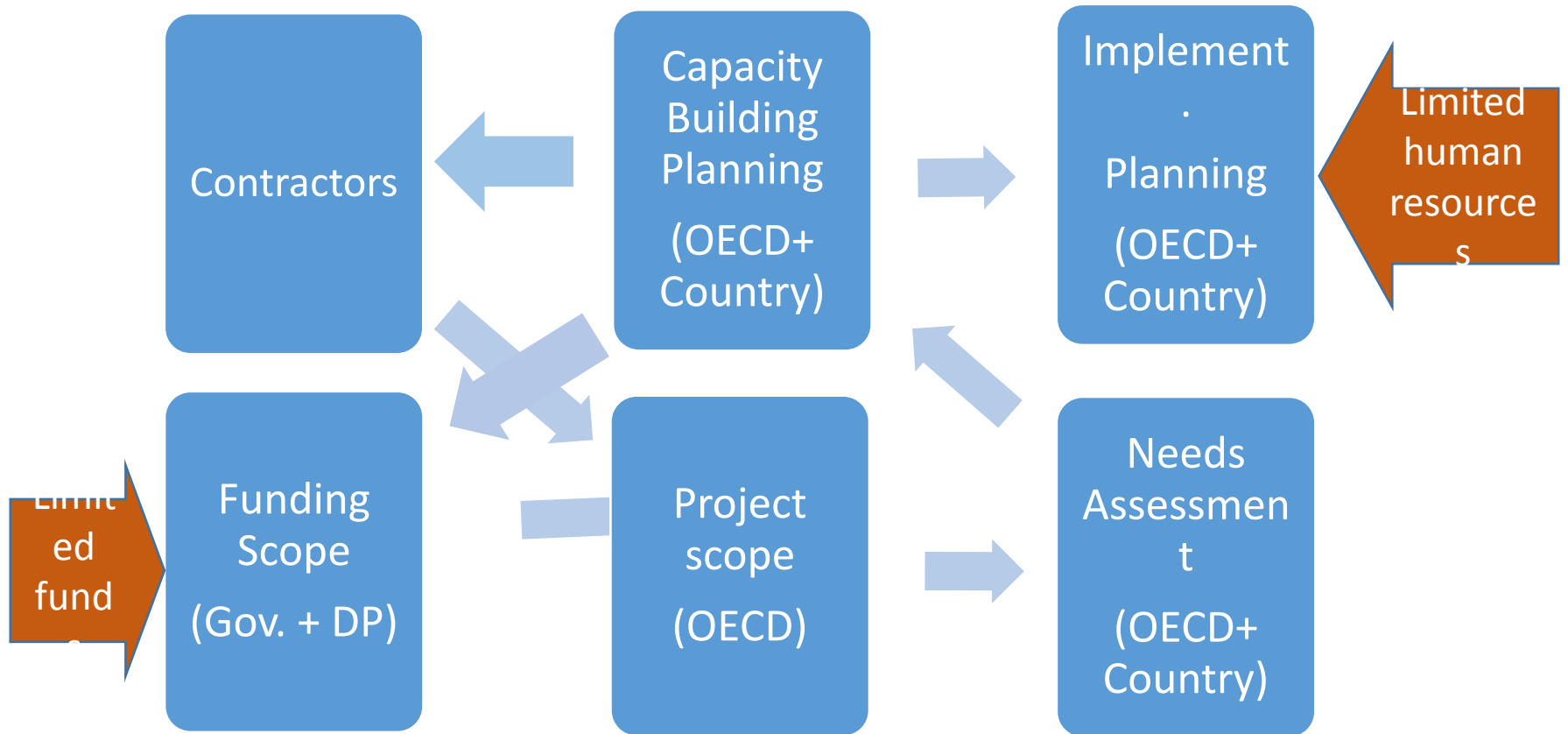
Funding Arrangements and Development Goals



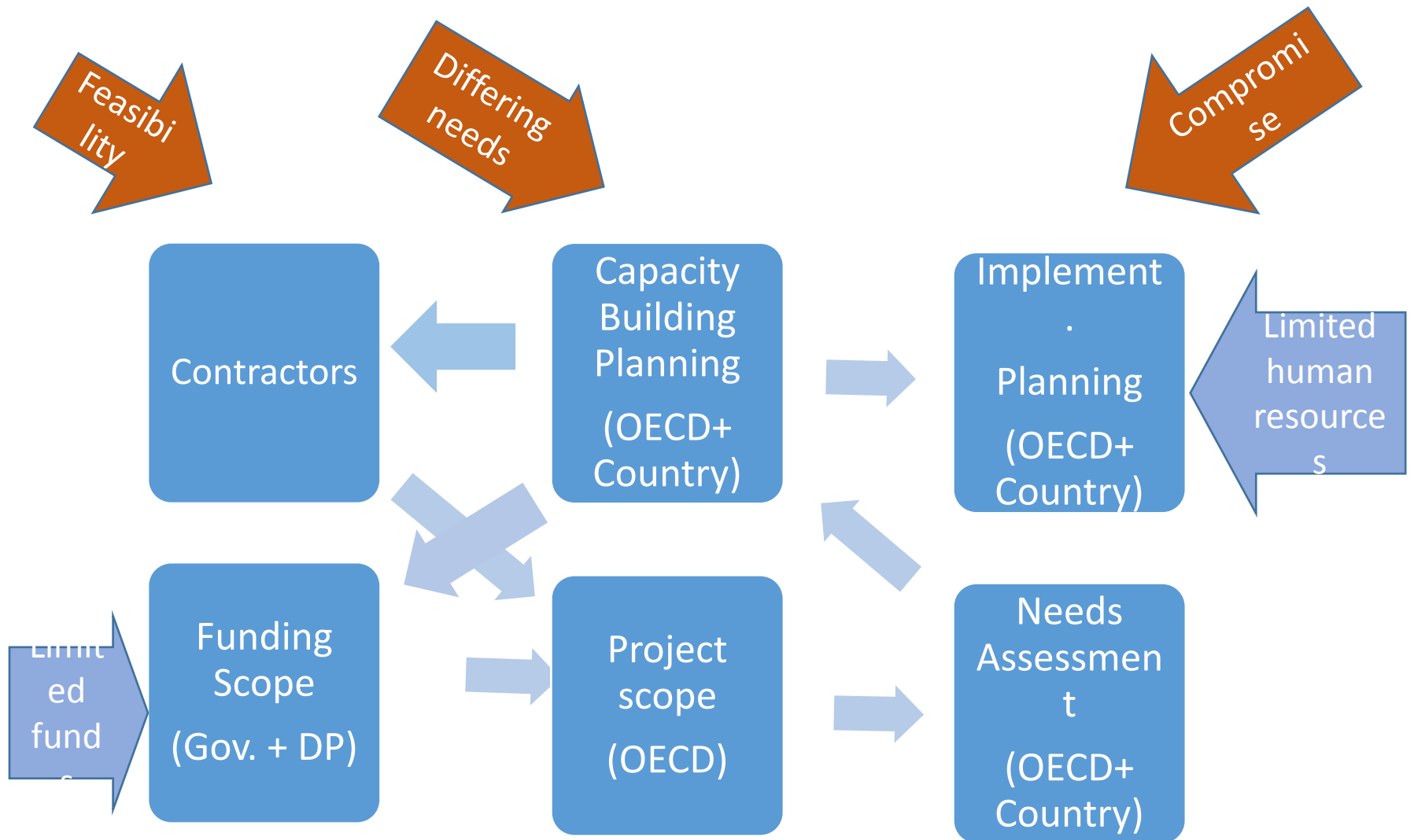
PISA Contractors



Competing same-sector projects



International Coordination

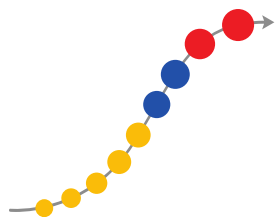


Lessons Learned

- Clarifying stakeholder interests and constraints
- Sharing the Big Picture early and often
- Planning for an iterative process
- Collaboration between stakeholders

Moving forward to implementation

- International design delimits minimum and maximum scope
- In-country priorities determine exact scope
 - Research or policy agenda
 - Capacity development goals
 - Sector development goals
 - Coordination with other activities
- International schedule allows countries flexibility to coordinate local activities beyond minimum implementation requirements
- Provide immediate feedback of potential consequences to decision-making process
- Use information tools appropriate to the project constraints



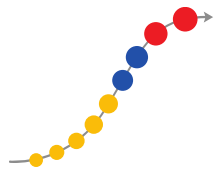
Instituto Nacional
de **Evaluación**
Educativa

Ecuador in Pisa-D

Project Implementation Plan

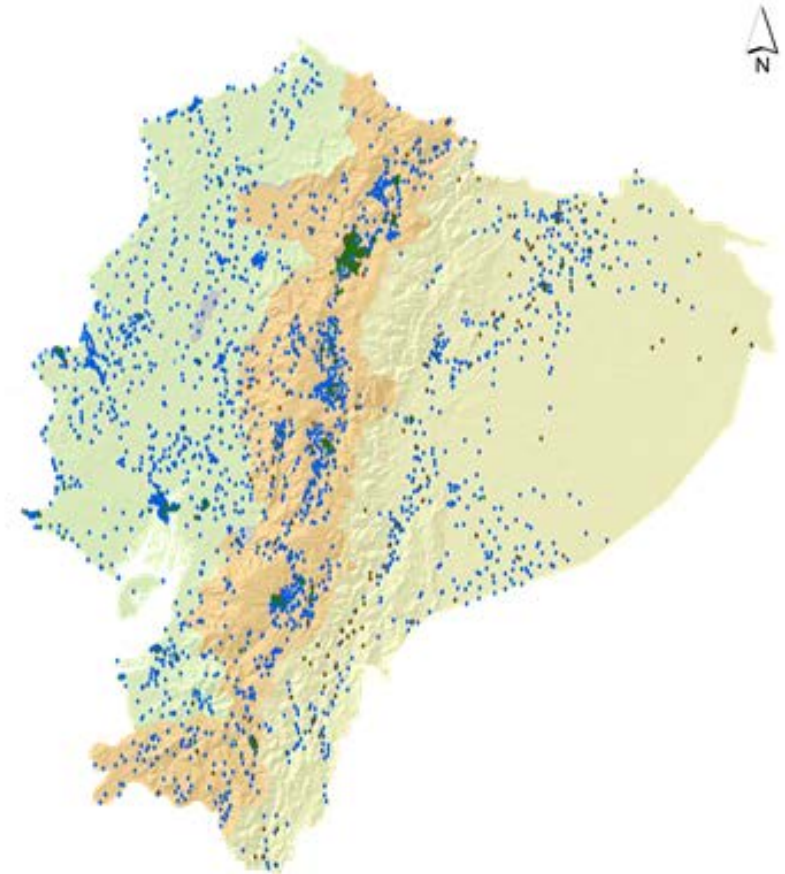
Por un Ecuador sobresaliente



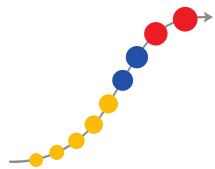


4'000,000 students
15.000 schools

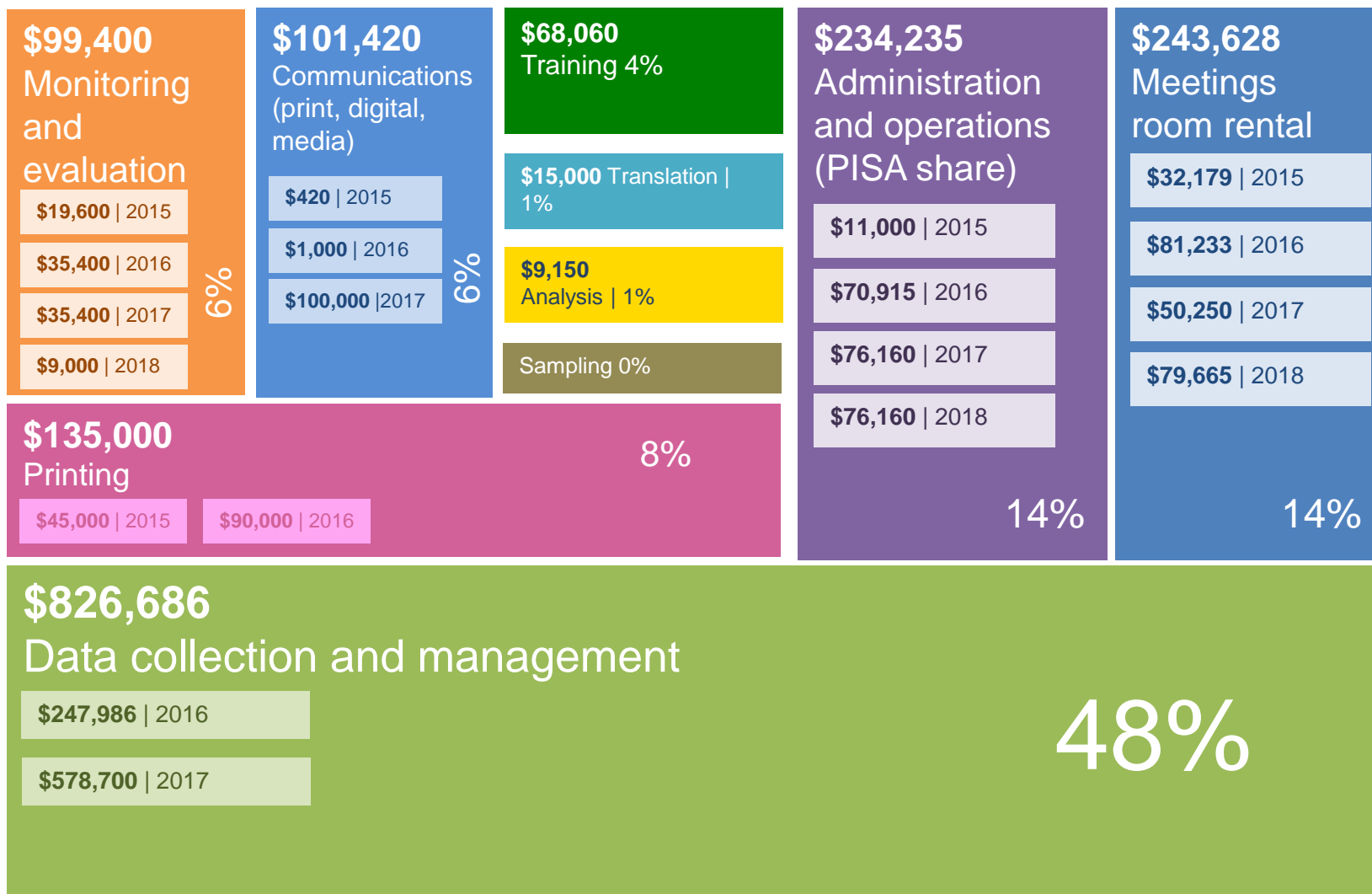
>500.000 candidates for PISA-D
>5.000 schools in the sample framework

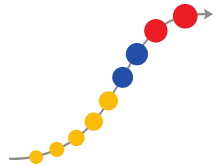


- ✓ **Two calendar**(North and South)
- ✓ The most of the 15 years old student are in 10th of high school
- ✓ Four regions: Galapagos islands, Cost, Mountains and Amazon.



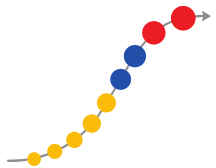
Resource allocation





- ✓ **Improve test quality** (Item development)
- ✓ Develop capacity for large scale assessment
- ✓ **Result analysis and communication**
- ✓ Develop capacities for quality control
- ✓ **Psychometric analysis**
- ✓ School, student and out of school **sampling**
- ✓ Response-code methods and protocols
- ✓ Entering data
- ✓ **Pisa framework**





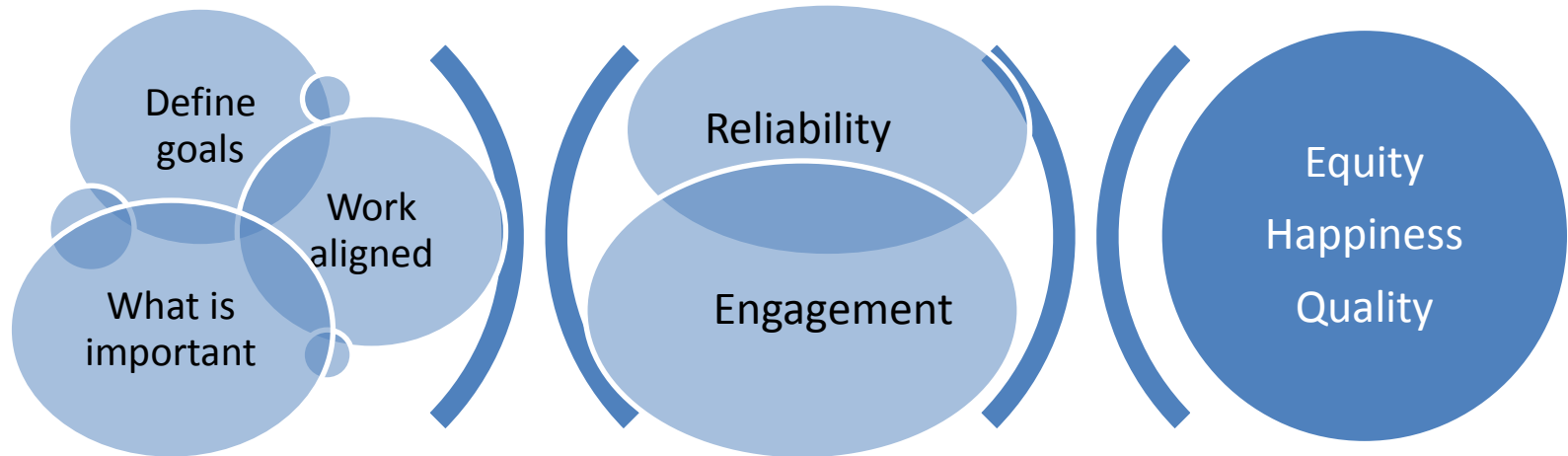
What do we expect from the project?

Changes

of mind

the relationships

the way to drive

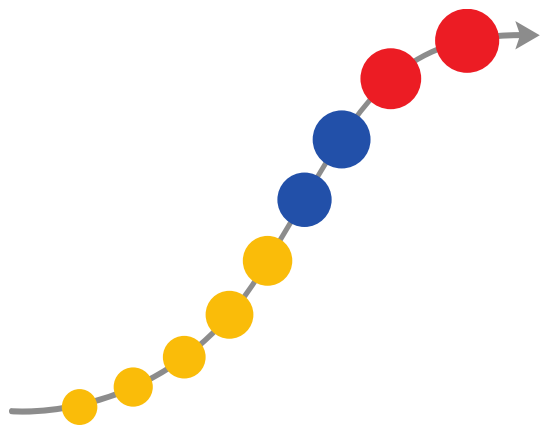


Community
education

Stakeholder
and Teachers

Authorities

Define better policies



Instituto Nacional
de **Evaluación**
Educativa

¡Muchas gracias!

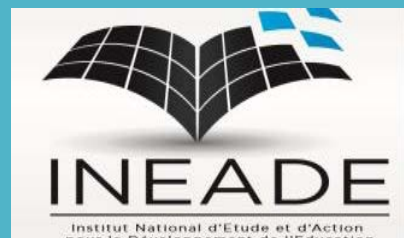
Por un Ecuador sobresaliente



Project Implementation Plan for Senegal



**INEADE, Blvd Martin Luther King x
corniche face à ex Camp Lat-Dior
(Tel :338232238, Fax : 338214851**



1. Contexte of Sénégal

In 2015, Senegal launched the “Plan Senegal Emergent” with the goals of reaching the status of an emerging economy by 2035 with a society characterized by social solidarity and justice. Education and human capital are key levers, to develop a workforce that is competent for the global economy, particularly in science and technology.

-The launch of the second ten year plan for education - *Programme d'amélioration de la Qualité et de l'Équité et de la Transparence (PAQUET)* which broadened education goals beyond access and *The Assises de l'éducation*, held in 2014, proposed recommendations for action to achieve successful schools (*une école de la réussite*).

Senegal has made the decision to increase free and universal education till the end of middle school and work is underway regarding implementation.

There was a measure of pride in the fact that Senegal was among the first countries to participate in PISA-D (Protocole : 140618/EDU/2014 du 30 juillet 2014) and that it was the only Francophone country in the pilot.

This would provide the opportunity to provide leadership and support to other countries in the region and to other countries in the Francophonie in student evaluations.

2. Outcome and results that the country expects from participating in PISA for Development

the first results would be a baseline and that in subsequent cycles the emphasis would be on increasing the pace of improvement, learning from the experience of countries such as Brazil.

The goal of achieving emerging economy status relies on human capital and education for the 21 century, particularly in maths and science.

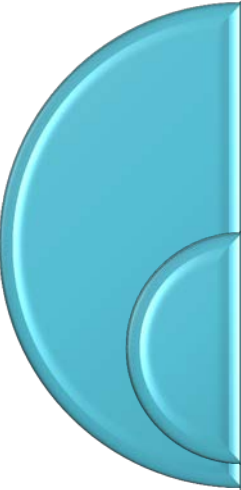
that data from PISA-D would be useful to use as indicators in the Annual Report on Education prepared by DPRE.

contribute to public debate and policy formulation, particularly for the (Direction de l'enseignement Prescolaire, Elementaire, Moyen et Secondaire Education)

identified in PISA-D, the variables that are effective in quality.

improve its evaluation capacity and be a resource for policy making and strategic planning for education

3. Milestone 1 : Stakeholder engagement



5.1.1.1 Ultimate goal: To work with stakeholders to introduce them to the value of PISA- D and to understand their needs for PISA-D evidence and to provide them with appropriate results for application.

5.1.1.2 Capacity Building initiatives: The PISA-D NPM and Director INEADE will provide updates as well as links to government priorities at the weekly *Comité de concertation et coordination*, Ministry of Education attended by all Directors of the Ministry of Education.

- An Advisory Committee will be set up by INEADE, in association with the Ministry of Education with key representatives from the Ministry and allied agencies in order to provide updates, preparatory information and results
- A stakeholder committee will be set up so that discussion on PISA-D can be held regularly with multiple stakeholders.
- The communication plan will include meetings with IAs and IEFs as well as other stakeholders such as schools and teachers on an as needed basis

Milestone 2 Upgrading existing and new quality procedures for PISA-D implementation

5.1.2.1 Ultimate goal: PISA-D will be successfully implemented meeting all standards and these standards will also be applied

5.1.2.2 Capacity Building initiatives: These related to the National Centre, security, logistics (human and material resources)

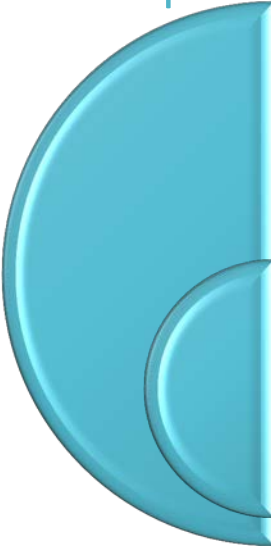
- ❑ A security policy with regard to software and antivirus protection will be developed for the PISA-D team including disciplinary penalties for breaches of security. PISA-D documents will be stored in a secure space with managed access

Logistics (human and material resources):

- ❑ There is a data base of data collectors who have experience with other large scale assessments with a comparable sample as PISA-D. Those selected to work on PISA-D will have specific training. For training larger groups than 40 (for example, 150 data collectors) space will be rented and the cost will be included in the PISA-D national budget.

- ❑ INEADE will conform with the international specifications for

Milestone 3: School, student and out-of-school youth sample



5.1.3.1 Ultimate goal: To develop a reliable school and student frame for sampling and to work with Agence National de Statistiques et Demographies (ANSD) to prepare a sample of out of school children based on the Census 2013, both preferably stratified by IAs to be policy relevant.

5.1.3.1 Ultimate goal: To develop a reliable school and student frame for sampling and to work with Agence National de Statistiques et Demographies (ANSD)

- ❑ The random choice of schools and the random choice of 15 year olds in schools will be designed to meet PISA standards. Develop a sample frame for children aged 15 in public, private and community schools from the data base at *Direction de la planification et de la réforme* (DPRE), which will be the first time a frame will be developed by age rather than grade.
- ❑ to prepare a sample of out of school children based on the Census 2013, both preferably stratified by IAs to be policy relevant. When details are available a plan will be made with ANSD for data collection in households working with the International contractor for Strand C.

Milestones 4 : Product development, communication and dissemination

5.4.1.1 Ultimate goal: To develop products for PISA-D, for preparation, implementation and dissemination of results which are general as well as targeted. To develop and implement a research plan and a communication and dissemination plan.

- A research plan will be developed for PISA-D.
- PISA-D results will be used for indicators, for example, for the annual report on education by the ministry.
- PISA-D research results will also target decisions for curricula, teacher training,
- The communication plan will include suggested processes to be undertaken by other actors of education
- A ministerial note was issued to announce participation in PISA-D and the Minister also announced it in parliament.
- The PISA-D dissemination plan will include the production of customized projects with PISA-D evidence for special audiences such as departments in the Ministry, schools and teacher training
- Plans for communication with the media will be included in the Communication Plan for preparing for PISA-D and for reporting on first results and more detailed evidence from research.

Milestone 3 : Increased INE/ADE capacity for large scale assessments

Ultimate goal : Up-to-date infrastructure for implementing PISA-D and national assessments.

Area for development: Psychometric methods
Ultimate goal: To develop a critical mass of staff in INE/ADE who understand, work with and interpret psychometric instruments, particularly those used by PISA-D.

- ❑ INE/ADE would need to increase the bandwidth and reliability of access to the internet. INE/ADE will include the upgrading of laptops and software for staff in the budget
- ❑ Capacity building courses will be delivered in French in Dakar. INE/ADE will have training in IRT, item banking, psychometric methods and multivariate analysis. This information will be used in the future to create an item bank by grade level. Training is

4. Description of activities/tasks and timelines for Senegal aligned with the international timelines

Senegal PISA for Development Implementation activities and tasks												
Year 1 - 2015	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Payment of international PISA fee	█											
Familiarization of PISA team with NPM manual and reading, math and science framework	█	█										
Purchase of laptop, server and software according to procurement regulations	█	█										
Development of confidentiality and data access protocols	█	█										
Discuss INEADE course content for three courses with International consultant and sign contract	█	█										
IAG			█									
Multi year budget plan with WB and DAGE	█	█	█									
Seeking additional donor funding	█	█	█									
Select members of advisory committee and agenda for first meeting. PISA orientation, budget, timeline, expectations, priorities and research questions for Senegal for analysis			█									
Advisory Committee meeting				█								
Agreement with ANSD based on Strand C requirements				█								
Select members of stakeholder committee and agenda for first meeting. Needs Analysis, CBP, PISA orientation, budget, timeline, expectations, priorities and research questions for Senegal for analysis			█									
Finalizing financing			█	█								
Stakeholder committee meeting					█							
Course on psychometrics						█						
Planning, preparing and organizing for peer to peer training								█				
Peer to Peer 1 - Conceptual frameworks								█	█			
School frame for sampling								█	█	█	█	█
Out of school children sampling								█	█	█	█	█
Finalizing country focus								█	█	█	█	█
Discussion and selection of 2 national questions for contextual questionnaire								█	█	█	█	█
Planning for field trial								█	█	█	█	█
Monitoring and evaluation recording	█		█			█			█	█	█	█

PARTNERS

- **World Bank**
- **AFD**
- **Canadian Embassy**

5. Budget and cost distribution of Capacity Building initiatives for Senegal (and INEADE) by year

	Capacity Building Elements	2015, USD	2016, USD	2017, USD	2018, USD	Total
PISA-D implementation 21 080	Stakeholder engagement	5 270	5 270	5 270	5 270	21 080
	Upgrading existing and new quality procedures for PISA implementation	22 800	55 200	27 200	57 760	162 960
	School, Student and out of school children	Sampling cost. Est USD 5 000				5 000
	Product development, Communication and Dissemination	39 150		7 000	80 000	126 150
Increased INEADE Capacity for large-scale assessments	Infrastructure improvements	51 300				51 300
	Psychometric methods	32 500				32 500
	Item writing and item banking		32 500			32 500
	Research methodologies			32 500		32 500
	Total	152 920	87 700	54 970	142 030	437 620



PISA FOR DEVELOPMENT

International Advisory Group
Meeting - Conclusions

Closing Session: Day One

11 March 2015

OECD Secretariat



Strong representation at the meeting from:

- **Countries signed up or committed to participation in PISA for Development (Ecuador, Guatemala, Paraguay, Senegal, and Zambia),**
- **Development partners (France, Germany (BMZ/GIZ), IADB, Ireland (Irish Aid), Japan(JICA), Norway, UK (DFID), World Bank,**
- **International agencies (UNESCO, UIS, UNICEF, EFA GMR, CONFEMEN and PASEC)**
- **International contractors, and**
- **Independent technicians in the field.**



PISA for Development International Advisory Group - Conclusions

- **Formally Adopted the ToR for the IAG with amendment for rotating co-chair**
- **Agreed co-chairs**
- **Discussed the next meeting of the IAG scheduled for March 2016, and Secretariat to follow up with countries about venue**
- **Formally adopted the ToR for the TAG and noted Secretariat to supplement membership**
- **Discussed and Approved the Annual Report**



- Reconfirmed unanimous support for the **PISA for Development** project.
- Acknowledged again the unique value that PISA has as an international benchmarking tool for quality and equity in schooling and for guiding policies for system improvement.
- Appreciated the actions taken since May 2014
- Approved the implementation schedule for the project and the statements of work for the international contractors but noted that this is subject to change as country schedules are established and need to integrate Strand C



- Asked that context measures are comparable with PISA and across participating countries.
- Asked the conceptual frameworks and materials developed by Strand B are shared to inform stakeholder management in the participating countries.
- Noted the importance of translating key materials, such as manuals, into French and Spanish; Secretariat to follow up



- Agreed the importance of seeking approaches for including out of school 15-year-olds in the study and recognised the significant challenges involved and the possible options for addressing these.
- Welcomed the finalisation Strand C ToRs.
- Recognised this as a distinct strand of the project and asked that the timeline for Strand C is integrated with that of Strands A and B.



- **Noted the important role that PISA for Development is going to play in building capacity in the participating countries, including**
 - **for developing and conducting national and international large scale assessments, and**
 - **for using performance data to diagnose strengths and weaknesses in the education system, and for supporting school improvement efforts.**



- **Appreciated how the Secretariat and its consultants have prepared the countries for implementing PISA for Development, including:**
 - **Facilitating capacity building plans, and**
 - **Helping countries to prepare Project Implementation Plans and aligning these to the overall project implementation schedule.**



- **Noted and supported the plans for peer-to-peer learning, especially NPM mentoring**
- **Noted the important role that PISA for Development and PISA can play in contributing to and measuring post-2015 global educational targets that are focussed on learning.**