EDP03

Educational Planning

Enhancing educators' expertise and professional development

EDP03: Educational Planning

Module delivered to: Cook Islands Ministry of Education

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Faculty of Arts, Law and Education
The University of the South Pacific

Contents

I. Introduction to Module

Educational Planning, EDP03, is one of four modules presented under the Professional Certificate in Education Policy and Planning offered by the Institute of Education in collaboration with the School of Education. The EDP03 Module is worth 5 credit points and offered at post graduate level. The EDP03 is aligned to the School of Education's ED492 Education Policy, Planning and Development. The module is delivered through face to face mode for two weeks. The module was developed by Dr Seu`ula J Fua of the Institute of Education with advice from Associate Professor Govinda Lingam of the School of Education and from Professor Mark Bray, University of Hong Kong. The module is delivered by Dr Seu`ula J Fua.

II. Prerequisite Course or Knowledge

Students wishing to take this module should have already gained admission into the Professional Certificate in Education Policy and Planning. As a pre-requisite for this course, students are assumed to be working in the field of education and expected to have some knowledge of their education system. Students are expected to have working knowledge of the national educational policy context, organisational structure of the national education system and the education management and information system (EMIS). Students taking this course are expected to be at managerial level including school principals, Chief Education Officers, District/Provincial education officers, and staff of national Planning and Policy Units.

III. Time

Time	Activities
DAY 1	**Approaches to educational planning:** Origin, concept and key characteristics of planning Strategic Planning Process Strategic Planning in Pacific Ministries of Education
DAY 2	**Approaches to educational planning:** Organisational arrangements for educational planning Designing a working schedule for planning
DAY 3	**Planning for Ministry of Education:** Sector Analysis (part 1) Context and policy analysis
DAY 4	**Planning for Ministry of Education:** Sector Analysis (part 2) Using EMIS and other statistics in sector analysis *Assessment 1: Group work on Sector study analysis (20%)*
DAY 5	**Planning for Ministry of Education:** Policy Formulation (briefly, covered in Module EDP02) Key Planning Objectives
DAY 6	**Planning for Ministry of Education:** Design of priority programmes (part 1) Logical Framework Matrix (LFM)
DAY 7	**Planning for Ministry of Education:** Design of priority programmes (part 2): Logical Framework Matrix application Ways of presenting programmes

	Assessment 2: Group work on Design of LFM (20%)
DAY 8	**Planning for Ministry of Education:** Preparation cost and financing framework (briefly, covered in Module EDP04) Design of the monitoring and review system: Monitoring procedure Key performance indicators
DAY 9	**Planning for Ministry of Education:** Writing& Revision of the draft plan *Assessment 3: Report on Case Study Analysis/Review of a national Ministry of Education (40%)*
DAY 10	*Assessment 4: Group Seminar presentation on case study analysis 20%*

IV. Module Rationale

The EDP03 Module on Educational Planning is one of four modules offered under the Professional Certificate in Education Policy and Planning. The Forum Education Ministers' meeting (FEdMM) in April 2012 gave the mandate to the USP to develop and deliver a training mechanism that will raise the capacity of national educational planners and policy writers in regional ministries of education. The Institute of Education with support from the School of Education in September 2012 conducted a training needs analysis in 6 countries of the region to gather information that will inform the design of the educational policy and planning program. The Professional Certificate in Education Policy and Planning was approved by the USP Senate for full development in November of 2013.

The Institute of Education, with advice from the School of Education and from Professor Mark Bray of the University of Hong Kong, have fully developed the modules for offering in semester 2 of 2014.

This module, EDP03 Educational Planning was developed in recognition of best global practice (drawing on literature from the UNESCO International Institute for Educational Planning) and local practice. The EDP03, like all other modules in the program, are designed for practitioners; and while they are inter-related, can be treated as a stand-alone module. The EDP03 Educational Planning intends to provide students with practical tools/templates that will assist them in conducting planning in their national ministries. The EDP03, Educational Planning is linked to ED492 Education Policy, Planning and Development. The EDP03 Educational Planning briefly discusses Policy analysis with the intent that students will fully explore policy formulation and analysis in EDP02 Educational Policy. Similarly, the EDP03 Educational Planning briefly covers the preparation of costing and financing framework for planning, and assumes that students will fully explore this topic in EDP04 Financing Education.

V. Module Objective(s)

The aim of the EDP03 Educational Planning module is to introduce students to the concept and rationale for educational planning; the organizational arrangements needed for educational planning; and the methods and techniques in educational planning.

Learning outcomes for students upon completion of this module:

1. Differentiate approaches, processes and structures to educational planning in a global and Pacific context.
2. Adapt theoretical knowledge and understandings to their own planning experiences and of leading educational sector plans.
3. Adapt specific educational planning tools in effectively undertaking educational planning exercise.
4. Assess current practices in educational planning in Pacific context.

VI. Content
Overview of Content& Rationale for Inclusion

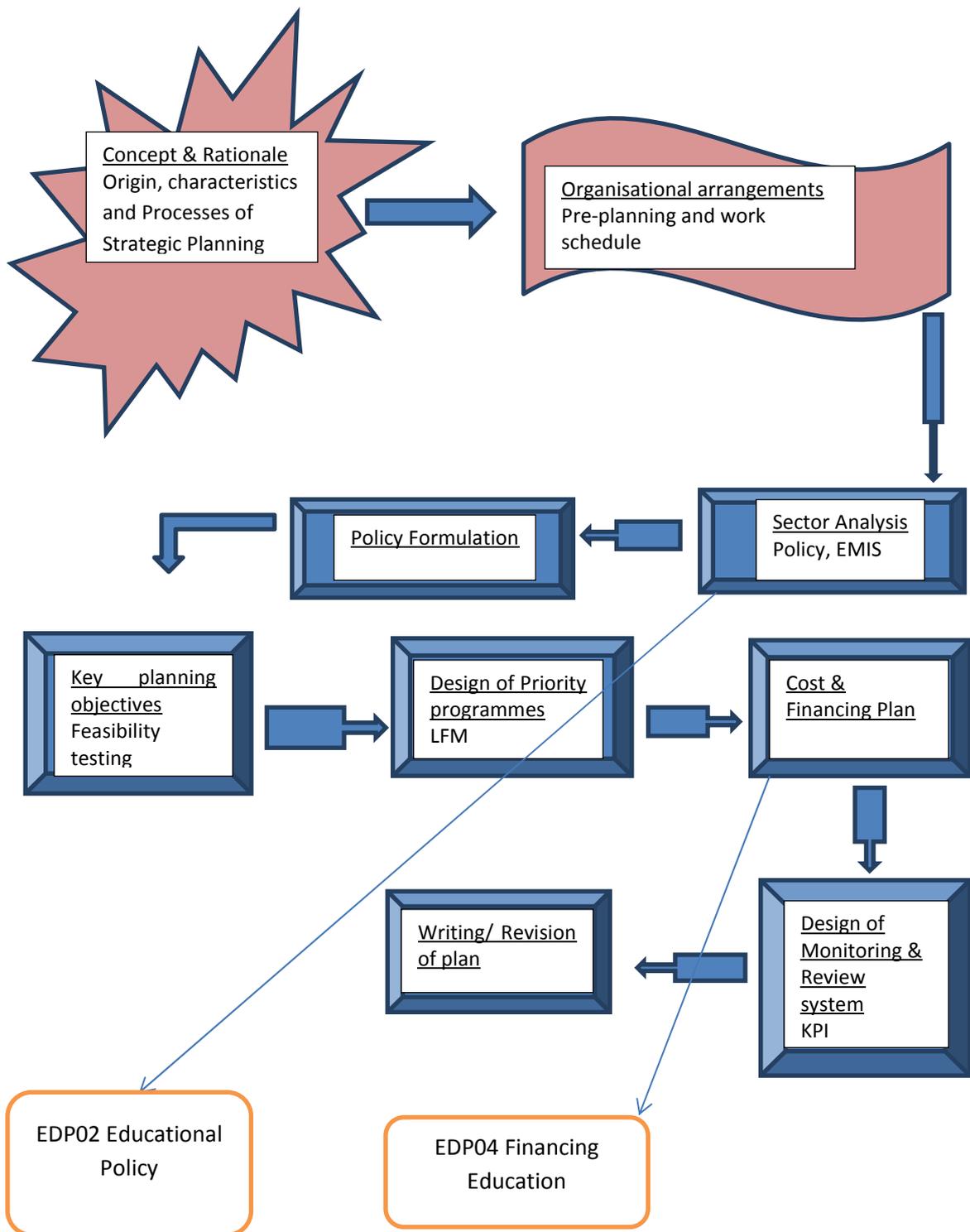| Content	Rational for Inclusion
Approaches to educational planning: Origin, Concept and key characteristics of planning Strategic Planning Process Strategic Planning in Pacific Ministries of Education	Students need to have sufficient understanding of the historical background and evolution of planning in organisations and in education. Prior to commencement of the module, it is helpful for students to see the overall system of planning and its use in a number of Pacific Ministries of Education. Students are expected to be able to differentiate approaches, processes and structures to educational planning in a global and Pacific context. Students are also expected to be able to assess current practices in educational planning in the region.
Approaches to educational planning: Organisational arrangements for educational planning Designing a working schedule for planning	It is critical for students to appreciate that planning happens within a particular organisation; and organizational arrangements and systems need to be in place for the tasks of planning to be effective. Similarly, it is important for students to appreciate the pre-planning that takes place prior to the process of planning. In this session, students will be encouraged to think critically of existing organisational structures and current processes of planning in the Pacific region. Students are expected to be able to differentiate approaches, processes and structures to educational planning in a global and Pacific context.
Planning for Ministry of Education: Sector Analysis (part 1) Context and policy analysis	Sector analysis is one of the key processes of planning is often hurried and unappreciated in the process; yet it is a critical part of the process as it informs consequent steps in the process. Students will be expected to learn how to adapt specific educational planning tools in effectively undertaking educational planning exercise.
Planning for Ministry of Education: Sector Analysis (part 2) Using EMIS and other statistics in sector analysis	The value of the sector analysis to the process of planning is reflected in the two days given to this topic. The value of EMIS in itself let alone its potential to add critical information for planning purposes has yet to be fully realised by national

	ministries of education in the region. Students will be expected to learn how to adapt specific educational planning tools in effectively undertaking educational planning exercise.
Planning for Ministry of Education: Policy Formulation (briefly, covered in Module EDP02) Key Planning Objectives	Although there is a module on educational policy (EDP02), a brief on the topic is necessary for students to see the link between policy and planning. The selection of key planning objectives that are realistic and feasible are two critical steps in formulating planning objectives and priorities. Students will be expected to learn how to adapt specific educational planning tools in effectively undertaking educational planning exercise.
Planning for Ministry of Education: Design of priority programmes (part 1) Logical Framework Matrix (LFM)	The design of priority programmes is the main phase of the planning process. The use of the Logical framework is a very helpful tool in formulating the priority programmes. Students will be expected to learn how to adapt specific educational planning tools in effectively undertaking educational planning exercise.
Planning for Ministry of Education: Design of priority programmes (part 2): Logical Framework Matrix application Ways of presenting programmes	The design of the priority programmes is a time consuming exercise but a valuable input in the whole planning cycle. Appropriate time will be given so that students have a sound understanding of this phase in the planning. Students will be expected to adapt theoretical knowledge and understandings to their own planning experiences and of leading educational sector plans. Students will, also be expected to learn how to adapt specific educational planning tools in effectively undertaking educational planning exercise.
Planning for Ministry of Education: Preparation cost and financing framework (briefly, covered in Module EDP04) Design of the monitoring and review system: Monitoring procedure Key performance indicators	A brief introduction is given here on the preparation of cost and financing a plan. EDP04 covers Financing education but the section is mentioned here to indicate the link between financing education and the planning process. The value of monitoring and review/evaluation system is often under- appreciated in most planning cycle or an afterthought. Students are introduced to tools that can assist in the monitoring and review of a system, including design of key performance indicators. Students will be expected to adapt theoretical knowledge and understandings to their own planning experiences and of leading educational sector plans. Students will, also be expected to learn how to adapt specific educational planning tools in effectively undertaking educational planning exercise.

Planning for Ministry of Education: Writing & Revision of the draft plan	Current situation in the region, shows that more plans are written by outside consultants than Ministry of education staff. Although time will not permit supervision over the writing of an actual plan, students will benefit from spending time on the techniques for writing an educational plan. Students are expected to differentiate approaches, processes and structures to educational planning in a global and Pacific context. Students will also, be expected to adapt theoretical knowledge and understandings to their own planning experiences and of leading educational sector plans.

Content Map

Concept & Rationale
Origin, characteristics and Processes of Strategic Planning

Organisational arrangements
Pre-planning and work schedule

Policy Formulation

Sector Analysis
Policy, EMIS

Key planning objectives
Feasibility testing

Design of Priority programmes
LFM

Cost & Financing Plan

Writing/ Revision of plan

Design of Monitoring & Review system
KPI

EDP02 Educational Policy

EDP04 Financing Education

VII. Key Words

Key vocabulary and terms

Term	Definition
Strategic Planning	Planning that takes into account the bigger picture, considering all options and changing environment with a focus on clear long-term goals.
Strategic Planning process	Recognising the different stages and phases of strategic planning.
Sector diagnosis	As the first step in strategic planning, involves detailed review of existing context (socio, economic, political) including the assessment of the education system and its performance.
Policy formulation	The process of putting together a policy.
Key plan objectives	Results of the sector diagnosis and policy will indicate the main purpose/objectives for the plan
Priority areas	As part of the key plan objectives, the priority areas signify the focus of the plan for that given time period. Usually arrived after careful consideration of cost and feasibility tests.
Cost and financing framework	A critical step in preparing the plan is the costing of the programmes and often becomes the final test on programs that are included or excluded from the current plan.
Monitoring	The continual check and validation of the programs of the plan involving a careful assessment of specific indicators and its performance. Monitoring is on-going and carried out a regular basis by both internal and external personnel.
Review	Often carried out mid-term in the planning and at the completion of the planning period. Often it involves outside personnel and report forms basis for future plans.
Feasibility test	Conducted to assess the affordability of the program and whether indicators expected outcomes and timeline are realistic given available resources
Logical framework matrix (LFM)	A tool used during the design of the priority programmes to ensure structured and systematic method of analysing problems and objectives.
Key performance indicators (KPI)	A tool used during the design of the monitoring and evaluation phase to identify the key indicators and set specific measurements to capture the performance of the plan.
Indicator	Used as a way to measure the performance or process towards achieving the objectives of the plan. An indicator is specified with a quantity, quality and timeline.

VIII. Teaching and Learning Activities

Planned Teaching and Learning Activities:

Day One			
TIME	CONTENT	TEACHING ACTIVITIES	STUDENT LEARNING OUTCOMES
9am – 1pm	1. Origin, concept and key characteristics of planning 2. Strategic planning process	Lecture notes and power point presentation (module materials)	*Differentiate approaches, processes and structures to educational planning in a global and Pacific context.*
2 – 5pm	3. Strategic planning in the Pacific and Ministries of Education	Collection of Strategic plans from around the region (module materials) *Application: Map existing knowledge& experiences of planning process in the Pacific and national ministry of education. Are there lessons to be learned from national planning processes?*	*Assess current practices in educational planning in Pacific context*
Day Two			
9am – 1pm	1. Organisational arrangements for educational planning	Lecture notes and power point presentation (module materials)	*Differentiate approaches, processes and structures to educational planning in a global and Pacific context.*
2 – 5pm	2. Designing a working schedule for planning	*Application: (i) draw up organisational arrangement for plan preparation; (ii) draw up schedule for Plan preparation phases.*	
Day Three			
9am – 1pm	1. Sector Analysis (part 1) 1.1 Context analysis 1.2 Policy analysis	Lecture notes and power point presentation (module materials)	
2 – 5pm	1.3 Analysis of management 1.4 Analysis of cost		
Day Four			
9am – 1pm	1.4 EMIS and other statistics in sector analysis	Guest speaker from national EMIS office/SPC	
2 – 5pm	2. Conducting sector analysis	*Application: Assessment 1 Group work on Sector analysis 20%*	*Adapt specific educational planning tools in effectively undertaking educational planning exercise.*

	Day Five		
9am – 1pm	1. Policy formulation 2. Key planning objectives 2.1 Turning problems into objectives	Lecture notes and power point presentation (module materials)	
2 – 5pm	2.2 Feasibility testing	*Application:Problem tree into Objective tree*	*Adapt specific education planning tools in effectively undertaking education planning exercise.*
	Day Six		
9am – 1pm	1. Design of priority programmes	Lecture notes and power point presentation (module materials)	
2 – 5pm	1.1 Examples of programmes & LFM from the region 1.2 Logical Framework Matrix (LFM)	Lecture notes and power point presentation (module materials)	*Differentiate approaches, processes and structures to education planning in a global and Pacific context.*
	Day Seven		
9am – 1pm	1.3 Completing a LFM		
2 – 5pm	Completion of LFM	<u>*Application: Assessment 2 Group work on completing LFM 20%*</u>	*Adapt theoretical knowledge and understandings to their own planning experience and leading educational sector plans.* *Adapt specific educational planning tools in effectively undertaking educational planning exercise.*
	Day Eight		
9am – 1pm	1. Preparation cost and financing plan 2. Design of the monitoring and evaluation system 2.1 Monitoring procedure	Lecture notes and power point presentation (module materials)	*Adapt theoretical knowledge and understandings to their own planning experiences and of leading education sector plans.*
2 – 5pm	2.2 Key performance indicators (KPI)	*Application: draw up KPI*	*Adapt specific educational planning tools in effectively undertaking educational planning exercise.*
	Day Nine		
9am – 1pm	1. Writing and revision of a draft plan	Lecture notes and power point presentation Collection of national educational plans (module materials)	*Adapt theoretical knowledge and understandings to their own planning experiences and of leading education sector plans.*

2 – 5pm	2. Work on Case study analysis	_Application: Assessment 3 Report on case study analysis/review of national education plan (40%)_	_Differentiate approaches, processes and structures to education planning in a global and Pacific context. Adapt theoretical knowledge and understandings to their own planning experiences and of leading education sector plans. Assess current practices in education planning in Pacific context._
Day Ten			
9am – 1pm	Seminar on Case study analysis of national education plans	Student led presentations	_Differentiate approaches, processes and structures to education planning in a global and Pacific context. Adapt theoretical knowledge and understandings to their own planning experiences and of leading education sector plans. Adapt specific education planning tools in effectively undertaking education planning exercise. Assessment current practices in education planning in Pacific context._
2 – 5pm	Conclude seminar on case study analysis of national education plans	_Application: Assessment 4 seminar presentation on case study analysis of national education plans (20%)_	

Assessment:

Summary of Assessments:

The EDP03 module takes a continuous assessment approach, with the following assessment tasks. Please note that all assessment tasks are due during the delivery of the module. Students are expected to, when necessary, complete assessments after class. When available, time will be given during the course for students to work on their assessments. For variation on the due date for the assignments, please talk with the instructor.

The USP Policy on Plagiarism and Dishonest practice applies. You can access this through the USP website: http://www.usp.ac.fj/index.php?id=calendar

Assessment descriptor	Weight %	Due date
1. Group work on Sector study analysis	20%	Day 4
2. Group work on completing Logical Framework Matrix (LFM)	20%	Day 7
3. Report on case study analysis/review of national education plan	40%	Day 9
4. Group seminar on case study analysis/review of national education plan	20%	Day 10

IX. Materials

Lecture notes and power point presentations

Compilation of Pacific Ministries of Education, Strategic Plans (CD)

List of statistics and databases available for the sector analysis

Education Policies for a selected number of countries

Assessment Descriptors, marking schedule and assignment sheets

X. Compulsory Readings and Useful Links

Puamau, Priscilla and Teasdale, G.R., eds. 2005. Educational planning in the Pacific: principles and guidelines. Suva, Fiji: The PRIDE project, University of the South pacific. (the most recent and comprehensive collection of papers on educational planning in the region).

Bray, Mark and Varghese, N.V. 2010. Directions in Educational Planning – Report on an IIEP Symposium, Research papers IIEP. Paris: IIEP – UNESCO. Full report is available from http://publications.iiep.unesco.org/index.php?route=product/product&product_id=1316

XI. Appendices

Assessment information and marking schedule are included in the Appendices. Students to use USP assignment cover sheets and follow USP regulations for assignment submissions.

XII. References

Carron, G. 2010. 'Strategic Planning, Concept and Rationale'. A working paper commissioned by IIEP. Paris: IIEP –UNESCO.

Carron, G. 2010. 'Strategic Planning, Organizational arrangements'. A working paper commissioned by IIEP. Paris: IIEP –UNESCO.

Carron, G. 2010. 'Strategic Planning, Techniques and methods'. A working paper commissioned by IIEP. Paris: IIEP –UNESCO.

Bray, M. & Varghese, N.V., 2010. 'Directions in educational planning – Report on an IIEP Symposium, Research papers IIEP. Paris: IIEP – UNESCO. Full report is available from http://publications.iiep.unesco.org/index.php?route=product/product&product_id=1316

Puamau, Priscilla and Teasdale, G.R., eds. 2005. Educational planning in the Pacific: principles and guidelines. Suva, Fiji: The PRIDE project, University of the South Pacific.

Appendix One: Assessment Information[1]

Assessment One: Group work on Sector study analysis

Weight: 20%

Due date: Day 4

Instructions:

1. Form a group of 2 - 3 people that you share similar interest and work experience.
2. From the list below, choose **one component** of interest and/or relevant to your current line of work. Ensure that all components are covered and only one group work on one component:
   - Context analysis (choose one from: macro-economic context demographic context, socio-cultural context, politico-institutional context)
   - Analysis of existing policies (choose one policy)
   - Analysis of the education system performance (choose one from: Access, internal efficiency, quality, external efficiency, equity)
   - Analysis of the management capacity
   - Analysis of cost and financing
3. Gather the necessary documents to conduct the analysis. Some of these documents are already available in the CD provided with the course materials. But other materials may need students to access either from the internet or from other sources.
4. Process and analyse the information by selecting a maximum of 2 indicators for statistical data or one document for the qualitative data (policy, report etc). Use of tables and graphs to display statistical results is encouraged here.
5. Use the findings from the analysis to brainstorm using SWOT analysis to identify specific objectives.
6. Present the findings of your group's analysis is a short, succinct report of no more than 5 pages.

Table of Marking Schedule:

Expected student learning outcome: Adapt specific educational planning tools in effectively undertaking educational planning exercise.

Levels of attainment	Descriptor	Comments
A: The very best understanding 18 - 20	Is able to critically *reflect* and *evaluate* a well-defined context by adapting specific tools in effectively undertaking educational planning exercise.	
B: Highly satisfactory 14 - 17	Is able to *explain, compare* and *apply* tools of sector analysis to a defined context.	
C: Quite satisfactory 10 - 13	Is able to *classify* and draw *comments* on a defined context having completed a sector analysis	
D: Just a Pass 9 - 10	Is able to *state* and *describe* a sector	
F: Fail	Is not able to complete task.	

[1]Further detailed information will be provided on the marking schedule prior to the class commencement, based on the context and the prior knowledge of the students.

Assessment Two: Group work on completing Logical Framework Matrix (LFM)
Weight: 20%
Due date: Day 7

Instructions:
1. Use the same grouping as in previous assessment work to carry out the second assessment.
2. Using the guide on completing a LFM (from lecture notes) work with your group to select an overall program objective (based on Day 5 work on problem tree and objective tree).
3. Describe the program objective and proceed to complete the template (given in class) on LFM.
4. Submit the LFM upon completion on or before the due date (Day 7).

Table of Marking Schedule:
Expected student learning outcome: Adapt specific educational planning tools in effectively undertaking educational planning exercise.

Levels of attainment	Descriptor	Comments
A: The very best understanding 18 - 20	Is able to critically *reflect* and *evaluate* a well-defined programme overall objective expressed clearly and logically effectively using a LFM as a planning tool.	
B: Highly satisfactory 14 - 17	Is able to *explain* and *apply* tool of LFM to a defined programme objective	
C: Quite satisfactory 10 - 13	Is able to *classify* and draw *comments* on a defined programme objective having completed a LFM	
D: Just a Pass 9 - 10	Is able to *state* and *describe* a programme objective having completed a LFM	
F: Fail	Is not able to complete task.	

Assessment 3: Report on case study analysis/review of national education plan.
Weight: 40%
Due date: Day 9.

Instructions:
1. This is an individual piece of work, but students are expected to use previous group work as part of the analysis.
2. Using the national strategic plan of your country, select one phase of the planning processes and conduct an analysis of the approach taken and presentation of that particular phase in the plan. For example, you can analyse how the approach taken to conduct the sector analysis, or the process of identifying key planning objectives, or the process for the design of the priority programmes. You can discuss this with the lecturer before proceeding with your analysis.
3. Using your experience, your knowledge of the national context and skilled gained from the course, evaluate and reflect on the selected component of the plan.
4. Your report structure, should clearly define the selected component of the plan to be analysed, the approach you have taken to conduct the analysis (i.e. use of your experience, knowledge etc, or a given framework), and key findings. Your report should be succinct, clear and simple with a maximum page number of 10 (including references).
5. This report is to be submitted on or before the due date (Day 9). If you plan well, you can begin working on this report from day one by inputting lessons/discussions and information from class and discussions.

Table of Marking Schedule:
Expected student learning outcome:

Differentiate approaches, processes and structures to education planning in a global and Pacific context.

Adapt theoretical knowledge and understandings to their own planning experiences and of leading education sector plans.

Assess current practices in education planning in Pacific context.

Levels of attainment	Descriptor	Comments
A: The very best understanding 18 - 20	Is able to critically *reflect* and *evaluate* a well-defined component of a national educational plan	
B: Highly satisfactory 14 - 17	Is able to *explain* and *apply* tools of educational planning to a defined component of a national education plan	
C: Quite satisfactory 10 - 13	Is able to draw *comments* on a defined component of a national education plan.	
D: Just a Pass 9 - 10	Is able to *state* and *describe* a defined component of a national education plan.	
F: Fail	Is not able to complete task.	

Assessment Four: Seminar presentation on case study analysis of national education plan.
Weight: 20%
Due date: Day 10

Instructions:
1. Use your existing groups to work on this assessment.
2. Select one of the tools that we have discussed and/or applied in the course (e.g. KPI, Monitoring procedure, LFM, feasibility testing etc) to conduct an analysis of its application in your national education plan. You may include findings from this group work as **part** of your report.
3. Assess and evaluate not only the application of the tool into your national education plan, but also the relevancy/applicability of the tool to your context.
4. Report your findings to the class in a 5 – 8 minute lively and interesting presentation. Your power point presentation should not be more than 4 slides, again keeping the presentation focused, interesting and on the key findings.

Table of Marking Schedule:
Expected student learning outcome:

Differentiate approaches, processes and structures to education planning in a global and Pacific context.

Adapt theoretical knowledge and understandings to their own planning experiences and of leading education sector plans.

Assess current practices in education planning in Pacific context.

Levels of attainment	Descriptor	Comments
A: The very best understanding 18 - 20	Is able to critically *reflect* and *evaluate* the use of a well-defined educational tool in a national educational plan	
B: Highly satisfactory 14 - 17	Is able to *explain* the application of an educational planning tool in a national educational plan.	
C: Quite satisfactory 10 - 13	Is able to draw *comments* on the usage of an educational planning tool in a national educational plan.	
D: Just a Pass 9 - 10	Is able to *state* and *describe* the usage of an educational tool in a national education plan.	
F: Fail	Is not able to complete task.	

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