

**EVALUATION OF  
KNOW-HOW FUND  
ASSISTANCE TO THE  
ENTERPRISE EDUCATION  
PROGRAMME, SLOVAKIA**

*by Jane Rindl and Michael Hanson*

DEPARTMENT FOR INTERNATIONAL DEVELOPMENT

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In May 1997 the former Overseas Development Administration (ODA) became the Department for International Development (DFID).

References in this report to the ODA apply to events and actions that occurred prior to the change of title and functions.

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The opinions expressed in this report are those of the authors and do not necessarily represent the views of the Department for International Development.

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## PREFACE

Each year the Department for International Development (DFID) commissions a note of ex post evaluation studies. The purpose of the DFID's evaluation programme is to examine rigorously the implementation and impact of selected past projects and to generate the lessons learned from them so that these can be applied to current and future projects. It should be borne in mind that the projects examined were the products of their time and that the policies they reflected and procedures they followed may, in many cases, have since changed in the light of changing DFID knowledge.

The DFID's Evaluation Department is independent of the DFID's spending divisions and reports directly to the DFID's Director General (Resources).

For this evaluation the team consisted of the following:

- Jane Rindl, Senior Consultant, Segal Quince Wicksteed Limited
- Michael Hanson, Senior Consultant, Segal Quince Wicksteed Limited

This evaluation is one of two which together form the overall contract. The other project evaluated under this contract is 'ODA Assistance to the Russian Agency (Know-How Fund), and a separate report has been submitted to DFID.

This evaluation involved the following stages:

- initial briefing of consultants by DFID representatives;
- desk study of relevant documentation;
- consultations with individuals and organisations concerned with the project in the UK and Slovakia, including a two-week field trip to Slovakia by the two consultants to collect relevant data, to visit the pilot schools and other key organisations and individuals involved in the design and delivery of the project;
- preparation of a draft report to be circulated for comment to the individuals and organisations most closely concerned;
- submission of the draft report to the DFID's Director General (Resources), to note the main conclusions and lessons to be learned from the study on the basis of the draft report.

This process is designed to ensure the production of a high quality report and summary sheet (EVSUM) which draw out all the lessons.

This study is one of a series of evaluations of projects in the small and medium enterprise sector. A synthesis study which draws out the conclusions and lessons from all these evaluations is also due to be available from Evaluation Department.

DFID Evaluation Department

## ACRONYMS, ABBREVIATIONS AND GLOSSARY

Contractor	LEntA, in association with the DoE: LEntA was contracted to manage the development and delivery of the project; DoE had responsibility for administration and financial management.
Core trainers	The 11 Slovak teachers, trained in the first wave of teacher training, who were then selected to undergo additional training to develop them into a Slovak training team with responsibility for training additional Slovak teachers to be able to deliver Enterprise Education.
DFID	Department for International Development (UK)
DoE	Department of Employment (UK)
DTI	Department for Trade and Industry (UK)
EATE	Enterprising Approaches to Teacher Education
Enterprise Education	The concept of enterprise education brings together a number of disparate ideas and practices operating at a number of levels. Within enterprise education there are two broad groups of activities. The activities in the first group are concerned with the implementation of setting up a business and are largely set outside educational institutions and contexts. Those in the second group are concerned with raising the awareness in educational institutions of the possibilities and excitement of creating work. Such activities can be made the vehicles for the delivery of wider educational benefits. These include knowledge, attitudes and skills related to autonomy, creativity, decision-making, collaboration and the pursuit of collective goals. (Definition provided in EvD DFID documentation for the Study, drawn from A G Watts (1984), D Cracknell (1983), I M Jamieson (1985)).
EvD	Evaluation Department, DFID
Extension project	The additional year of the Enterprise Education Slovakia project (1994-95), supported by additional funding from the Know-How Fund
FEE	Foundation for Enterprise Education
Gymnasium	Slovak general secondary school
IER	Institute for Educational Research (Slovakia)

IoE	The Slovak Institute of Education (formerly Institute for Educational Research, before being merged with the ITT to form the IoE)
ITT	Institute for Teacher Training (Slovakia)
KHF	Know-How Fund (UK)
LEntA	London Enterprise Agency
Maturita	Slovak national secondary school final examination
METEL	Merseyside Enterprise Training Limited
MoE	Ministry of Education (Slovakia)
ODA	Overseas Development Administration (UK)
Original project	The Enterprise Education Slovakia project which ran from 1992 to 1994
Phare	Poland Hungary Assistance in the Restructuring of the Economy
Pilot Schools	The three schools with which the Enterprise Education programme was developed and initially delivered: <ul style="list-style-type: none"> <li>• Stredná priemyselná škola Hutnícka, Košice (Technical School for Metallurgy)</li> <li>• Stredná priemyselná škola potravinárska, Nitra (Technical School for the Food Industry)</li> <li>• Stredná priemyselná škola textilná, Ruzomberok (Technical School for the Textile Industry)</li> </ul>
Programme	Refers to the training programmes which comprised the project including Enterprise Education, Training for Working Life, and the Teacher Training
Project	Refers to the overall initiative to develop and implement Enterprise Education and Training for Working Life
SCIP	School Curriculum Industry Partnership
'Second stage' schools	The schools to which Enterprise Education has been disseminated through teacher training and certification, and are therefore schools qualified to offer the subject in their schools
SME	Small and Medium Enterprise

SMT	Slovak Management Team
Stakeholders	The key Slovak and UK organisations involved in commissioning and delivering the Enterprise Education Slovakia project
TORs	Terms of Reference
TWL	Transition to Working Life
UK Project Team	The team of representatives from the five UK organisations with responsibility for designing and delivering the Enterprise Education Slovakia project
Vocational schools	Schools which provide a technical specialist education for secondary students (also referred to as technical schools)
YE	Young Enterprise



## **EXECUTIVE SUMMARY**

### ***THE PROJECT***

1. The project funded the provision of technical assistance 'to develop an Enterprise Education<sup>1</sup> programme capable of being transferred over time throughout the Slovak system of education and training so as to develop enterprise skills in individuals through practical experience.' A group of recipient organisations was formed to design and pilot the programme, including the Slovak Ministry of Education and Institute of Education, and three vocational secondary schools were selected for their technical specialisms and geographical location. The technical assistance was provided by a consortium of five UK-based organisations each with a specialism in the field of enterprise education. The assistance was provided between August 1992 and July 1995 with a total budget of £318,124, and was delivered within budget, following interim negotiations and an extension to the project.

### ***THE EVALUATION***

2. The evaluation was undertaken by Ms J Rindl and Mr M Hanson, Senior Consultants with Segal Quince Wicksteed Limited.

3. The evaluation was based on reviews of Department for International Development (DFID) and Know-How Fund (KHF) project files and documentation; interviews with key UK project team members and a visit to Slovakia which incorporated extensive discussions and interviews with a wide selection of representatives from the national institutions and the pilot schools involved in the project.

### ***OVERALL SUCCESS RATING***

4. The project can be judged very successful in achieving its objectives and, in some cases, exceeding them. The design and delivery of the project were highly professional, and the design and management appropriate to project needs. The project was characterised by its flexibility, on the part of the UK contractors and the Slovak recipients but, in particular, by the KHF, which, by adopting an unconventional approach to

<sup>1</sup> See page iii for definition of Enterprise Education in relation to this project

commissioning and defining the project, contributed greatly to the formation of a cohesive and committed team and to achieving a result which was appropriate and customised to the recipient needs.

5. The transfer of know-how and skills and the consequent local capacity building has been achieved and a sustainable system is in place which should ensure the continuation of the dissemination process but there are some weaknesses which still need to be addressed. These might have been reduced if the project had included in its design the provision of greater support during some elements of the initial implementation phase.

6. There is no doubt, however, that the project made a major contribution to the development of an enterprise culture in the education system in Slovakia and it is doubtful whether any of the results would have been achieved without the benefit of the project.

## ***FINDINGS***

7. The Enterprise Education project was multi-faceted, complex and relatively large scale in KHF terms. Whilst its objectives were broad-ranging, its focus was clear and the project succeeded beyond the expectations of both the Slovak and the UK project teams. The evaluation supports this view (paragraphs 2.42-47).

8. The project was commissioned without a competitive tender, and undertaken by a consortium of organisations, each with a specific and relevant specialism. A rich mix of skills and experience was brought to the project and this enabled the team to be tailored to Slovak needs as the project progressed. Whilst an unusual approach to selecting the contractors was taken, the method the KHF employed of selecting the contractors prior to defining the project and the circumstances under which the project idea evolved enabled the critical project-definition phase to be undertaken on a collaborative basis involving both the UK project team and the Slovak potential recipient bodies (Paragraphs 2.24 and 31; 4.13).

9. The original project terms of reference were clear and whilst no project framework was designed, detailed plans and a rolling timetable were put in place early in the project. The original project overspent by between 6% and 10%. The KHF felt this overspend was justifiable and provided additional funding to cover it. Due to the evolutionary nature of the project, the benefit of an extra year to complete a number of tasks and expand a

number of others became clear, and the KHF approved a project extension which produced an enhanced final product (the materials), the wider dissemination of the programme, and the putting in place of a sustainable structure, without need for further donor funding (Paragraphs 2.12-16).

10. It must be acknowledged, however, that balanced against this laudable outcome, there were design and exit strategy weaknesses and the continued dissemination activity has relied heavily on the goodwill of the core trainers. It is also clear that the project design underestimated the need to guide and encourage the recipients in the implementation phase, particularly in terms of establishing education-industry links and fund-raising activities (Paragraphs 4.14 and 33).

11. Project management was closely controlled and monitoring and review events were built in so that, although the targets and milestones were flexible, the mechanisms were in place to address divergencies in a timely manner. Reporting was regular and informative, although the budget information documents contain some minor inconsistencies which have made it difficult to pin down exact budgeted and actual expenditure. The financial information is also organised in a way which does not lend itself to allocating expenditure directly to the various project tasks (Paragraphs 2.32, 3.4 and 4.8).

12. Few numeric targets were defined and this has made it difficult to assess the success of the project in quantitative terms. No mechanism for collecting and co-ordinating data is in place, and the fragmentation of these data and in some cases their absence make it difficult to gain an overall picture of the scale of the activity. This evaluation has consequently had to rely on estimates and extrapolation to arrive at a view of the quantifiable output and the project's cost-effectiveness. The KHF's careful negotiation of fee rates down from normal commercial rates and the arrangements put in place to cover expenses incurred in Slovakia have meant, however, that a substantial saving has been made and the budget has covered a higher volume of activity than would otherwise have been possible (Paragraphs 4.1-5).

13. Two years after the project's formal end, the Enterprise Education programme continues to be included in the national Compulsory-Optional curriculum, to be disseminated at a constant rate, and there is a waiting list of additional schools wishing to become involved. The pilot schools remain champions of the programme, and are playing a key ambassadorial and managerial role in promoting and disseminating the programme, together with the Foundation for Enterprise Education (FEE). The formation of this Foundation has provided a coordinating structure and centralised focus for the programme, a potentially sustainable indigenous structure, and a mechanism to take on some of the tasks and responsibilities of the national institutions, should their

involvement reduce in face of economic pressures (Paragraph 4.32).

14. The project has been competently managed and delivered to a very high professional standard; the majority of objectives have been met, and in the few cases where performance has not matched expectations, there is a justifiable rationale for this. The project set out to change attitudes, develop new forms of behaviour and raise awareness, as well as transferring concepts, know-how and methodologies. These were very ambitious and relatively long-term aims and the project has succeeded admirably.

### **LESSONS LEARNED**

15. Much good practice emerged from this project, which should inform the design and delivery of future projects, both within the education sector and in other areas where scale and structure are similar. In retrospect, there are elements of the project which could have been designed and delivered differently and additions which would have benefited the overall outcome but the impact of these adjustments would have been minor and at the time it was not always clear that they were necessary. The learning points which emerged from the analysis are listed below.

16. **Project identification process and the role of the donor organisation:** The early flexibility of the donor organisation contributed very positively to the identification and design of the project. A willingness to accept a project whose structure was fluid and which evolved enabled the project to be tightly targeted to the needs of the recipient institutions and country. The speed of response in terms of approving funding ensured momentum was maintained and no delays occurred due to funding gaps (Paragraph 8).

17. **Design of project team:** The multi-organisation delivery team enabled a wide variety of know-how and skills to be brought to the project, which may not all have resided within a single contractor organisation. Encouraging this team format has implications, however, for management, and such a team together with the complexity of the Slovak institutional make-up, requires a strong, tight and continuous management presence, which should probably reside in an individual who is not involved in the project's day-to-day operational aspects (Paragraph 8).

18. **Creating a culture of 'ownership' in the recipient organisations:** the sense of ownership amongst the Slovaks, both in the pilot schools and in the institutions, was extremely strong. This in part can be attributed to the relevance of the project to their needs; but also to the approach taken to designing the programme and defining its

objectives, which included the Slovaks and was flexible enough to be adapted to their needs as the project progressed. There is a tendency for donor organisations and contractors to be prescriptive, which causes the recipient organisation to feel imposed upon. This was, however, quite the opposite in the Enterprise Education project where the recipient organisations felt highly engaged, have taken over ownership in practical terms, and continue to deliver the programme two years after the project ended (Paragraphs 8 and 13).

19. **Selection of teachers:** for this project, subject specialism was secondary to interest, motivation and openness to new ideas. In particular, the pupil-centred training methodologies involved a significant change in approach which in some cases was met with resistance. The initial view that economics teachers were the most appropriate candidates to take on the teaching of Enterprise Education was proved not to be the case, and selecting candidates with the necessary personal characteristics achieved a more successful outcome (Paragraph 3.10).

20. **Giving the school directors practical experience:** whilst the Directors were involved throughout the project, and continue to be, it is mainly in a networking and organisational capacity, and although they could talk theoretically about the objectives and benefits of the programme, they found it difficult to identify what the impact on the students actually was. School Directors in Slovakia are not necessarily teachers, unlike in the UK, but it was strongly felt by the UK project team - in reviewing the project - that the latter would have benefited from a module built into the training, specifically for Directors, to give them a similar practical experience to that which their teachers and pupils were receiving. Integrating the directors more strongly into the project would also give them an understanding of the project's wider potential implications in the school, in terms of cultural changes and impact on the curriculum content and methodology.

21. **Provision of support during implementation:** this project underestimated the support needed by the Slovaks for some activities. A strong view was expressed by members of the UK project team that the project would have benefited if the UK project team had been able to provide guidance and encouragement for a longer period of the implementation process. This was particularly the case with the establishment of the FEE at a late stage of the project. The result has been that the staff associated with the Foundation understand the principles of their responsibilities and the tasks they need to deliver but are probably insufficiently skilled or practised to undertake these tasks (and fund-raising and promotion activities, in particular) successfully. These weaknesses could have been overcome if suitable activities had been built into the project earlier so that there was greater integration of the UK and Slovak teams and therefore more opportunity for guidance and encouragement, on-the-job. In broad terms, the timing of the project

completion is critical to future sustainability (Paragraph 10).

22. **Maintaining quality:** the model to cascade out know-how and skills in order to disseminate the programme more widely is working well but the core trainers have relatively little practical experience of operating in a market economy or an enterprising environment and this could lead to a dilution in the quality of understanding of core concepts and methodologies. Future similar programmes (and indeed this one) would benefit from an element of continuous professional development built into the programme for both core trainers and teachers, in the form of periodic 'refresher' or 'top up' courses. Steps are being taken by the teaching cohort to address this need in the form of an experience exchange forum (Paragraph 3.47).

23. **Data collection:** a systematic process of data collection and co-ordination has not been built into this project, with the result that no-one knows precisely what numbers have been trained or what happens to students after they have been trained. This information would be useful not only for carrying out an evaluation, but also for the purposes of promoting the project nationwide and eliciting funding from public and private sector sources (Paragraph 12).

## EVALUATION SUCCESS RATINGS

The Overall Success Rating for a project is allocated on a scale from **A+** to **D** according to the following rating system:-

Highly Successful (A+):	<u>objectives completely achieved or exceeded</u> , very significant overall benefits in relation to costs
Successful (A):	<u>objectives largely achieved</u> , significant overall benefits in relation to costs
Partially Successful (B):	<u>some objectives achieved</u> , some significant overall benefits in relation to costs
Largely Unsuccessful (C):	<u>very limited achievement of objectives</u> , few significant benefits in relation to costs
Unsuccessful (D):	<u>objectives unrealised</u> , no significant benefits in relation to costs, project abandoned

The judgement on the Overall Success Rating is informed by a tabulated series of judgements on individual aspects of performance, including the project's contribution to achievement of ODA's priority objectives (listed in the upper section of the table). First an assessment is made of the relative importance in the project of each criterion or objective, which may be Principal or Significant; or, if not applicable, it is marked "-". Where no specific objective was established at appraisal, the importance assessment is given in brackets. Each performance criterion is then awarded a rating, based only on the underlined sections of the five-point scale above.

Project Performance Criteria	Relative Importance	Success Rating
Economic Liberalisation	Significant)	B
Enhancing Productive Capacity	-	-
Good Governance	-	-
Poverty Impact	-	-
Human Resources: Education	Principal	A
Human Resources: Health	-	-
Human Resources: Children by Choice	-	-
Environmental Impact	-	-
Impact upon Women	-	-
Social Impact	(Significant)	A
Institutional Impact	Principal	A
Technical Success	Principal	A
Time Management within Schedule	Significant	B
Cost Management within Budget	Principal	B
Adherence to Project Conditions	Significant	A
Cost-Effectiveness	Significant	A
Financial Rate of Return	-	-
Economic Rate of Return	-	-
Institutional Sustainability: NCPD	Principal	B
Institutional Sustainability: NGOs	Principal	A
Overall Sustainability	Principal	A
<b>OVERALL SUCCESS RATING ODA PROJECT</b>		<b>A</b>



# 1

## BACKGROUND

### *THE PROJECT IN CONTEXT*

1.1 In 1991, Slovakia was experiencing a high level of uncertainty and rapid social, political and economic change as it moved towards a market economy. Indigenous industry faced the need to become competitive and a climate of restructuring which was likely to result in high levels of unemployment and, in the short-term, a reduction in employment opportunities.

1.2 This problem was particularly acute for students graduating from vocational schools, which have a specialist technical focus, where traditionally the route had been to employment with the large employers in the sector and locality. The schools tend to be located near the key employers, but with privatisation and a reduction in state funding, jobs were no longer so plentiful.

1.3 For schools facing this challenge and seeking a solution to the impending high unemployment, the prospect of exposure to a menu of UK enterprise initiatives, through a Know-How-Fund (KHF) supported project was attractive, providing as it did a means of preparing students to work for themselves or to gain employment in small businesses. Over and above that, the schools and the relevant educational institutions in Slovakia were keen to ensure that students understood and valued the new economic climate and were as well prepared as possible to succeed in the evolving market economy.

1.4 Following an initial visit by a delegation of enterprise education experts in 1991, the KHF agreed in 1992 to finance a project to:

- a. develop an enterprise education programme which was student-centred and developed skills in individuals through practical experience;
- b. develop the indigenous capacity to be able to adapt the scheme throughout the Slovak system of education and training;

- c. harness the support of the wider community, in particular local and UK businesses, for the scheme and to create a sustainable support system for it by ensuring the active involvement of all key stakeholders and local community representatives;
- d. promote the concepts of small business and self-employment and stimulate the employment of young people, through linking school leavers into Slovakia's developing business support networks.

1.5 The project objectives were developed by a team of UK educationalists, in conjunction with a staff member of the Department of Employment (DoE) seconded to the Know-How Fund in Slovakia. The project did not go out to competitive tender but, following negotiation of its scope and budget, the KHF approved a contract with the London Enterprise Agency (LEntA) for the latter to take responsibility for project delivery and management of a team drawn from four other UK organisations involved in enterprise education. The factors which determined the choice of contractor were not explicitly specified and the original selection of the contractor was based on its previous track record in successfully delivering KHF projects, and previous contacts with key individuals.

1.6 The two-year contract was awarded in August 1992 and an extension and additional funding were agreed to run from 1994 to July 1995. Between 1992 and July 1995, when the extension to the project was completed, the Project Coordinator and the four key team members paid regular visits to Slovakia and hosted a number of study tours to the UK. A total of 337 consulting days in the UK and 314<sup>2</sup> days in Slovakia were expended, covering the following broad activities:

- programme design
- materials design
- trainer training
- mentoring
- delivering training to students
- support to infrastructure development
- promotion of the programme

<sup>2</sup> Source: data aggregated from a number of key project documents.

1.7 LEntA submitted a number of key reports and review documents, including a final project report dated 13 June 1995.

1.8 The project memoranda (original and extension projects) estimated the total costs of the technical assistance to be £318,124.<sup>3</sup> This included provision for an overspend, and within these parameters, the project was delivered within budget.

### ***EVALUATION OBJECTIVES***

1.9 The main aims of this evaluation are to assess how far the objectives of the assistance project have been, or are being realised, in particular in terms of sustainability within the Slovakian education system; to identify the immediate and wider impact of the assistance; to highlight good practice which may be applied to the design and commission of future projects, and to make judgements as to overall success and cost-effectiveness. The detailed Terms of Reference (TORs) for the evaluation are at Annex A.

### ***EVALUATION METHODOLOGY***

1.10 The evaluation of this project required a combination of qualitative assessment and quantitative analysis of inputs and outputs, to identify the extent to which the objectives had been achieved and the impact of the intervention. The DFID's evaluation guidelines were followed, particularly in terms of adopting a 'with versus without' analysis of the project results.

1.11 Few quantitative project targets were specified at the outset, and it was therefore not possible in many cases to make a judgement as to whether the outputs met or exceeded targets. The benefits of a project like this one, where know-how transfer, institutional development and capacity-building are core elements, are often not easily capable of quantification. As far as possible, a quantitative assessment of costs and benefits has been attempted but many of the elements of the evaluation are only sensibly evaluated through qualitative analysis, and this approach has been widely applied here.

1.12 To ensure that the qualitative research yielded results which were as objective as possible, the evaluators carried out detailed and in-depth interviews with a wide range of the key personnel involved in the project's commissioning, design and delivery. Annex B lists the people consulted.

<sup>3</sup> Documentation provided by EvD gave different figures for Commitment (£398,677) and Expenditure (£387,437). However, these figures include expenditure for Financial Year 1991/92, prior to the commencement of the project, and 1995/96, which extends beyond the end of the project. These figures still indicate that the project was delivered within budget.

Given the differing roles of each of the interviewees, questionnaires and structured frameworks for interviews were not considered appropriate in all cases. Where there was a similarity of roles, the discussions were structured under key headings, and in the case of the students, a standardised aide memoire was used.

1.13 The original project had no 'logical framework', as was common for KHF projects at the time this one was commissioned. It would have been feasible conceptually for the evaluators to construct a retrospective logframe, but it was felt that there would have been a danger implicit in this in that the outputs might have been sub-consciously 'matched' with what was known to have happened during the project. Alternatively, given the flexible way in which the project was defined and evolved, the outputs may have differed considerably from those specified in a retrospective logframe which had been constructed to reflect the beginning of the project without taking into account the project's developmental nature, with the consequent impression that the project's objectives had not been met (when in fact the project was widely considered a success). The evaluators note, however, the absence of a logframe, and that a project designed now would not suffer from the absence of one.

1.14 To undertake the evaluation, a variety of activities were carried out:

- a. a comprehensive study of project documentation made available by the KHF Joint Assistance Department;
- b. in September 1997, two consultants made a two week field visit to Slovakia. Key institution staff were interviewed in Bratislava and the pilot schools in Kosice, Nitra and Ruzomberok were visited. Comprehensive discussions were held with the Directors, core trainers, enterprise education teachers, and a selection of past and present students from each of the pilot schools. The consultants also carried out a visit to a 'second stage' school in Liptovský Mikuláš.
- c. Four of the five key members of the UK project team were interviewed in October, as well as the Department of Employment (DoE) representative who was instrumental in originally defining the project.

1.15 In the two years which have elapsed since the formal end of the project, there have been a number of personnel changes, particularly in the Slovak institutions. However, the consensus of the UK project team was that practically all the key individuals, instrumental in the design and delivery of the project, had been consulted.

## 2

### IDENTIFICATION, DESIGN AND APPRAISAL

#### *PROJECT IDENTIFICATION*

2.1 In 1991, a visit to Czechoslovakia was made by UK business representatives, led by the Prince of Wales, which identified a need to 'put enterprise firmly into education, if students coming out of school were going to be in a position to handle the rapid and substantial changes occurring in the Czechoslovak political and economic environment'. The DoE, with KHF funding, subsequently invited the LEntA to assemble a team of education experts, representing the spectrum of approaches to, and activity in, Enterprise Education in the UK, to visit Czechoslovakia and present a portfolio of initiatives which had been successful in the UK in promoting the concepts of enterprise for school children and school-industry links.

2.2 At this point, the 'mission' was a discrete event which was not put out to tender and LEntA's invitation to lead the delegation of 12 representatives was based on its previous working relationship with the KHF.

2.3 The three-day visit included a one-day conference for key representatives from the sphere of education in Czechoslovakia, followed by one day of meetings with each of the Ministries of Education in Prague and Bratislava.

2.4 As a result of the visit, the Slovak Ministry of Education, in conjunction with then Deputy Director of the Institute for Educational Research (IER) in Slovakia, requested the KHF to support a project in Slovakia to develop the concepts presented during the initial meeting into an Enterprise Education programme for Slovak secondary schools.

2.5 The project was to be based on the mini-enterprise and Young Enterprise (YE) programmes, with an added teacher training element, so as to build a sustainable Slovak capacity for dissemination. A need was also identified for provision, in the first year of the project whilst the institutional infrastructure was being established, of a one-year course for final year students, who would not have access to the complete two-year programme. This course had the title of 'Transition to Working Life' (TWL) and it focused on equipping the students with business planning skills and the development of operationally credible business plans

2.6 LEntA, together with a number of the organisations which had already been involved in the original visit as sub-contractors and all acknowledged specialist organisations in their fields, were asked to develop plans and budgets for the project on a non-competitive basis. These were approved by the KHF in August 1992, following some preliminary work with the Slovak Ministry of Education MoE and IER to develop project objectives and to identify and select pilot schools with which to implement the project. Selection of the schools was carried out by developing a short-list, based on the IER's recommendation, and inviting each of the eight short-listed schools to make a presentation to a panel. Criteria for selection included geographical location, vocational specialism, enthusiasm for the project, and in one case the combination of a vocational school and a gymnasium under one director, thus offering the opportunity to involve a secondary gymnasium. No explicit eligibility criteria were defined, however, in terms of quality or ability to deliver the project.

2.7 The UK's 5 member project team was drawn from the original six organisation-team, (one representative from each) all with experience of bridging the gap between education and the world of work, encouraging industrial support of schools; and developing pupils' economic and industrial understanding.

Table 1: UK Project Team

<b><i>Partner Organisation</i></b>	<b><i>Role in the Project</i></b>
Enterprising Approaches to Teacher Education (EATE)	Responsible for Enterprise Awareness for Teachers and Teacher Trainers
London Enterprise Agency (LEntA)	Co-ordinator of the Project
Merseyside Enterprise Training Limited (METEL)	Responsible for Transition to Working Life
School Curriculum Industry Partnership (SCIP)	Responsible for Enterprise Awareness for Students, Teachers and Teacher Trainers
YE	Responsible for Enterprise Awareness for Students

2.8 The DoE (and subsequently the Department of Trade and Industry (DTI), co-ordinated and financially administered the project, whilst the project's component parts were delivered by members of the partnership, actively managed by LEntA with the other organisations in the role of sub-contractor. (Annex C contains details of the UK project team members).

### ***THE PROJECT OBJECTIVES***

2.9 The project objectives were developed through a process of negotiation between the UK Project Team and the IER, whose Director subsequently became the Slovak project Co-ordinator.

2.10 The project's overall goal was to 'develop a scheme capable of being transferred over time throughout the Slovak system of education and training so as to develop enterprise skills in individuals through practical experience'. It was intended that the scheme would actively involve teacher trainers, teachers, students, and the wider community, with particular reference to businesses locally and in the UK. It was envisaged that the scheme would ensure that school leavers could be linked into the developing business support networks in Slovakia, stimulating the employment of young people and promoting the concepts of small business and self employment.

2.11 Specifically, the objectives described in the proposal, submitted by LEntA through the DoE to the KHF on 1.5.92, were:

- a. to build a self-sustaining Slovak Management Team (SMT) to facilitate the development, implementation and dissemination of the pilot project and subsequently to supervise its expansion across the Slovak Republic;
- b. to establish implementation groups in pilot schools to work at local level to build a partnership in education and training and network the project's development;
- c. to develop a framework of support materials which could be expanded at school level in the light of experience and local conditions;
- d. to deliver the programme and provide training and support at Republic and local levels throughout the project period;
- e. to devise a system of accreditation to support the initiative;

f. to set project targets and establish an ongoing programme of monitoring an evaluation against these targets;

g. to set up practical Enterprise counselling services in the schools for the 1992 school leavers who would have left by the time the full programme was implemented.

## **PROJECT FINANCING**

2.12 The project budget was originally set at £162,550, with an additional DoE/ODA monitoring budget of £2,450. The budget broke down as follows:

Table 2: Breakdown of Original Project Budget

Original Project	Total Budget: 1992-94	1992/93 Budget	1993/94 Budget
Induction and training	£53,200	£53,200	
Support local school launches	£12,000		£12,000
Develop education materials	£3,750	£3,750	
Support, monitoring accreditation final evaluation	£49,200	£24,600	£24,600
Transition to Working Life	£16,400	£16,400	
UK project team meetings	£18,000	£9,000	£9,000
Co-ordinating Charge	£10,000	£5,000	£5,000
<b>TOTAL:</b>	<b>£162,550</b>	<b>£111,950</b>	<b>£50,600</b>

2.13 Additional funding of £10,799 was negotiated to cover an overspend on the original project.

2.14 A year's extension to the project was agreed early in 1994, when it became clear that, due to the downturn in the Slovak economy, funds expected from Slovakia would not be forthcoming. £125,000 of additional KHF funding was agreed to cover the costs of:

- a. ensuring effective dissemination nationally
- b. incorporating the Enterprise Education principle in the compulsory Economics curriculum;
- c. establishing a Slovakian Foundation for Enterprise Education.

2.15 Table 3 provides a breakdown of the extension project budget.

Table 3: Breakdown of Extension Project Budget

<b>Extension Project</b>	<b>Budget: 1994/95</b>
8 Team meetings	£11,200
4 visits to Slovakia by groups of consultants	£40,110
1 evaluation visit	£15,360
Training YE Examiner	£1,700
Materials development and production:	
- research	£2,500
- preparation of materials	£19,000
- translation and printing	£18,500
Management fees	£8,330
Contingency	£8,300
<b>TOTAL:</b>	<b>£125,000</b>

2.16 Included in these two budgets were fees and expenses for a total of 337 consultant days in the UK and 314 consultant days in the Slovak Republic, over the three year duration of the project. It was not possible to discern the exact mix of days relating to consultancy, planning and design, training and support to the Slovak team.

#### ***ASSESSMENT OF KEY ISSUES RELATING TO IDENTIFICATION, DESIGN AND APPRAISAL***

2.17 The project goal and objectives were clearly defined, for both the original project and its extension. As noted in paragraph 1.13, no Logical Framework was produced for the project and few measurable outputs or indicators were defined. That said, the project's purpose was very clear to both the UK contractors and the Slovak management team and, as the project unfolded, to the Slovak recipients; also a defined project framework existed in terms of funding available, time period, and project description. Where there was a lack of clarity was, initially, in conveying the project objectives to the teachers in the three pilot schools. The Slovak view, however, expressed by the core trainers and school Directors, was that this was not a problem, and indeed it was advantageous, since it allowed those teachers who were really interested and motivated to be identified, and this contributed to the quality of the teachers trained to teach Enterprise Education.

2.18 The project was only loosely defined in terms of outputs and indicators, and the method of defining the objectives was an incremental negotiation between the UK project team and the Slovak management team. This was, however, considered to be a project strength, in that the design of the project was flexible enough to take account of the volatile and rapidly changing Slovak political and economic environment, and the needs of the pilot schools and the Slovak educational system. These needs, they argued, became apparent, in detail, only as the UK and Slovak teams worked together after the project launch. The project's flexibility enabled adjustments to be made during the project to ensure the project was as accurately targeted as possible. Positive appreciation has been expressed by all elements of the Slovak and UK teams regarding the KHF's approach and its speed in approving the project.

### ***Conformity with broader policy priorities of the Government of Slovakia***

2.19 In 1991/92 the political and ideological structures of the previous political environment were being deconstructed and the need to acquire the skills and know-how to develop and operate in a market economy were considered of paramount importance. International support and advice was relatively new and all levels of the Slovak educational system were keen to become involved with an international project with objectives designed to meet the needs of the evolving Slovak system; and to support the move towards an enterprise culture. Such a move was seen to be a necessary response to declining state structures and the consequent difficulties confronting school leavers seeking employment in an increasingly competitive environment.

2.20 The Directors of the three pilot secondary level vocational schools, shared the ambitions described in the preceding paragraph but they also perceived the enterprise education programme as an effective mechanism to provide a bridge between economics and the vocational schools' technical specialist subjects. The development of a curriculum which was both theoretical and practical was held, by the Directors, to have considerable synergy with the broad activities of their schools.

2.21 As the Ministry of Education, on behalf of the Government of Slovakia, was instrumental in requesting and defining the project, on behalf of the Government of Slovakia, the project's focus on enterprise education must have conformed with the Government's priorities, particularly since Government funding was made available to support it (approximately 6% of the total project funding came from the Slovak Government via the Ministry of Education).

2.22 The timing of the project clearly fitted closely with the changes occurring in Slovakia, and in that sense it was 'of its time'. At the time of the evaluation, the political situation in Slovakia was such that there was a prevailing pessimism amongst educationalists that some forces in the educational infrastructure would favour a more traditional approach. Thus, if the project were to be offered in Slovakia now, the Directors of schools would be less likely to choose to act as pilot schools, due to their disillusionment with the slow progress in developing a democracy and a market economy. On the other hand, the Slovak team members are fiercely proud of what they have achieved and the backward shift in policy appears to have had the effect of making them more convinced of the need for, and benefits of, enterprise education in Slovakia. Enterprise Education continues to be in the National Compulsory-Optional curriculum<sup>4</sup> but apparently relies on regular review by the MoE and the fact that both the liaison contacts within the MoE have "championed" the subject's continued presence in the curriculum. There is, however, a danger that it could be omitted in the future.

## ***SELECTION OF THE PROJECT PERSONNEL***

### ***UK Project Team***

2.23 The selection of the UK project team has unusual features inasmuch that the project was not put out to competitive tender. Rather, the project was developed incrementally, and optimised the experience and understanding gained by the original 1991 delegation. The result was a team which had already started to develop some institutional and personal relationships with the Slovak recipients by the launch of the project and had already gained knowledge of the Slovak educational environment, essential for ensuring project design tailored to Slovak needs.

2.24 In demonstrating its faith in the original team, the KHF also created the conditions for the project objectives and design to evolve, based on what was effectively a training needs analysis carried out during the discussions of the original three day visit in 1991. The selection of the UK team, whilst not conforming with common tendering practice, worked well, provided continuity, and gave an opportunity to develop project terms of reference in partnership with the Slovak recipients.

<sup>4</sup> In Slovakia there are three categories of inclusion in the National Curriculum: (i) the compulsory curriculum, which students must complete; (ii) the compulsory-optional (where subjects are included in the curriculum and students choose from a menu of options; once an option has been selected, the student is obliged to complete the course); and (iii) the voluntary curriculum (which is taught out of hours with no obligation to complete).

The selection process resulted in the inclusion of appropriate institutions in Slovakia in the development process and contributed significantly to the embedding of the subject in the curriculum and, therefore, to long-term sustainability.

### ***Slovak Project Team***

2.25 Five Slovak institutions had a key involvement in the project: the MoE, IER (later amalgamated with the Institute of Teacher Training (ITT) to become the Institute of Education (IoE), and the three pilot schools. At the project's outset, the IER and the ITT were separate organisations with very different structures. The project team faced difficulties in involving the ITT's regional staff because the latter apparently considered the project to belong to a rival department. Only towards the programme's end was this difficulty overcome by the two institutions' merger.

### ***Slovak Institutions***

2.26 The two national institutions, the MoE and the IER, were self-selecting in that they drove the initiative to acquire the project. In particular, the Deputy Director of the IER understood the concepts and the potential for adapting them to the Slovak educational environment and was mainly responsible in the early stages for pushing the project forward and getting it accepted.

2.27 There was a strong rationale for including each of these institutions, apart from their interest. The IER was essential because it had responsibility for creating the secondary school curriculum in Slovakia and gave official recognition to the Enterprise Education curriculum created by the project. The IER also became the institution with responsibility for certifying teachers trained to teach the subject of Enterprise Education.

2.28 The MoE acts on the advice of the curriculum professionals from the IER, and releases money from its budget for the training of new schools so that they can teach Enterprise Education. The Ministry also has a second role: to advise on the Government Directives which define the school curriculum. The MoE representative was responsible (with the project team) for the subject's inclusion in the national curriculum which enables any qualified school in the country to offer the subject, once it has completed the prescribed training.

### ***Pilot Schools***

2.29 On the basis of the selection process described in paragraph 2.6 above, three secondary technical schools were chosen to pilot the project out of eight which expressed interest:

- a. Košice: Stredná priemyselná škola Hutnicka (Secondary Vocational School for Metallurgy)
- b. Nitra: Stredná priemyselná škola potravinárska (Secondary Technical School for the Food Industry)
- c. Ruzomberok: Stredná priemyselná škola textilná (Secondary Vocational School for the Textile Industry)

2.30 The selection process was carried out by the IER, together with the UK team. The focus on vocational schools was driven by two factors: (i) the problems of employment which graduates from vocational schools were facing; and (ii) the key individual driving forward the project in Slovakia, had responsibility in the IER for vocational schools in the IER, and therefore could only relate the project to the educational sector over which he had control.

### ***Team Structure***

2.31 A view was expressed that it would have been possible for the project to have been delivered with a less complex UK project team but that this would have reduced the richness of the input gained from the mix of expertise and experience embodied in a project team drawn from five organisations with different specialist foci. The evaluators are of the view that a less complex project team would not necessarily have represented an opportunity to deliver the project for a lower cost, given that the size of the consultant team was, if anything, considered to be smaller than desirable and the project team's broad experience, drawing as it did from a number of different areas of education, was beneficial to the project.

2.32 The critical role with such a project team was that of the project coordinator, and the consensus is that this role was carried out in an appropriate manner, providing adequate freedom to the UK team members, whilst at the same time exercising sufficient control to co-ordinate and monitor closely his diverse team, as well as managing effectively the large number of stakeholders involved in the project.

### ***ADEQUACY OF CONDITIONALITY ATTACHED TO ASSISTANCE***

2.33 The KHF's approach to conditionality was implicit rather than explicitly defined. Drawing down payment depended on activities having been achieved and milestones met, and these were defined clearly in the project memoranda and monitored throughout the project.

2.34 Again, the KHF's approach relied on close monitoring and control of progress and regular liaison between the project manager and the KHF, rather than a clearly defined system. Had targets not been met, there does not appear to have been any explicit system for managing the situation, or a clear claw-back provision.

2.35 Whilst in practice no problems were experienced, it is questionable whether sufficient eligibility checks were put in place in the initial identification and design phases of the project to ensure that such issues as the selection of UK and Slovak partner organisations and the pilot schools were carried out in a suitably rigorous manner, or whether it was more a matter of luck and subjective judgement that suitable choices were made.

# 3

## IMPLEMENTATION

### *INTRODUCTION*

3.1 The project was originally designed to last for two years, starting in 1992. In 1994, an extension to the original project was proposed by the project manager and agreed by the KHF, largely to provide additional funding to fill an expected gap caused by the downturn in the Slovak economy which affected the Slovaks' ability to finance certain elements of the originally agreed programme. The extension project's three broad objectives were:

- a. to ensure effective dissemination of the programme nationally;
- b. to incorporate its principle in the compulsory Economics curriculum;
- c. to establish a Slovakian Foundation for Enterprise Education.

3.2 The stages of the original and extension projects are described in detail in project reports produced by the project manager, members of the UK project team and external appraisers; and in the KHF project memoranda. Annex D contains a list of key documentation consulted. Annex E contains a detailed schedule of project visits.

### *MONITORING AND REVIEW*

3.3 The project was closely monitored and regularly reviewed through a combination of actions, including:

- a. regular, minuted team meetings, reports of which were submitted to the KHF;
- b. regular visits by the UK project team to monitor and assess progress against the various tasks and milestones which had been defined in the action plan (Annex D);
- c. external monitoring visits carried out by a DTI representative in May 1993 and by KHF officials in June 1993;

d. project completion reports submitted to the KHF's Joint Assistance Unit.

3.4 The reporting system worked effectively to keep relevant institutions apprised of project progress and related issues, and also to provide regular feedback and advice and recommendations. The intensity of the system enabled potential risks and issues to be rapidly assessed and acted upon at each stage of the project.

3.5 The UK project team was comfortable with the monitoring arrangements, although it would have welcomed further visits by KHF representatives later in the project. Its assessment of the relationship with the KHF was that it was essentially administrative and a higher profile presence from the KHF advisers would have been welcomed. It (a) could have contributed to various elements of the project (for example raising awareness), and (b) would have provided a mechanism for liaison and continuity between this and other projects, either existing or subsequently.

3.6 Less satisfactory was the state of the output data available to assess progress. The project would have benefited from a system of data collection, in key target areas, to provide the means to assess project results and impact quantitatively. Such data as do exist are fragmentary and for the purpose of this evaluation estimates have had to be based on assumptions and recollection. Few specific quantified targets have been identified, and little comprehensive data exist by which to measure success. That said, the feedback from the UK and Slovak teams indicates that expectations have been exceeded.

## ***PROJECT OUTCOMES***

3.7 This evaluation took place two years and three months after the formal completion of the project. The outcomes identified below are therefore a result of the activity carried out during the project and up to the time of the evaluation visit. An assessment was made of the outcomes at the end of the formal project, in the preparatory stages of the evaluation. Whilst this evaluation does, where possible, distinguish between the situation at the end of the formal project and the current situation, the intention is to assess the overall achievements to date and activities which are on-going as a result of the KHF project investment.

### ***Schools and Teachers***

3.8 The three pilot schools have just started the fifth year of teaching Enterprise Education. In addition to the three pilot schools, 54 more schools are now certified to offer the subject of Enterprise Education in their Compulsory-Optional curriculum. Over

220 teachers have completed the teacher training, trained by Slovak trainers from the three pilot schools, and have gained a subject teaching certificate awarded by the IoE. Teachers from eighteen more schools were being trained in academic year 1997/98, and current plans are to continue at this level in future years. There is a waiting list of schools which have applied to become qualified to offer the subject (thus meeting the objective listed at (a) in paragraph 3.1 of this report).

3.9 The Slovak core trainer cohort has reduced from 11 to 8, the loss being due to emigration and job changes.

3.10 The profile of teachers qualifying to teach Enterprise Education does not reflect the original plan, where it was envisaged that the key teachers would be teachers of economics. Teachers with a wide range of subject specialisms have, however, been trained, selected mainly on the basis of English language ability originally, and their interest. Economics teachers have experienced more difficulty coping with the concepts, the pupil-centred approach and participative teaching methodologies than teachers of other disciplines. This is due, in part, to having to cope with the change in the economic curriculum from one based on a centrally planned economy to one with a market economy base. A similar problem has been experienced in incorporating the Enterprising Economics materials, developed in the extension project, in the Economics curriculum, and any success that has been achieved is because of an individual teacher's interest, and not because of a policy decision by the school's economics department.

### **Students**

3.11 Complete data on the number of students participating in the Enterprise Education programme for each of the years it has been offered were not available from the pilot schools, but they provided figures for throughput in the 1996/97 academic year, together with some incomplete data for earlier years, illustrated in the table below:

Table 3: Numbers of students participating in Enterprise Education in pilot schools

School	1993-95	1994/96	1995/97	1996/98
Koöice	figures not available	100*	100*	70
Nitra	figures not available	105	100*	135
Ruzomberok	figures not available	70	60	30
<b>Total</b>	<b>not known</b>	<b>275</b>	<b>260</b>	<b>235</b>

\* estimated figure

3.12 With regard to numbers across the whole of Slovakia, neither the pilot schools nor

the FEE had any data on the volumes of students participating in any of the other schools. Discussion with teachers from the three pilot schools and the 'second stage' school visited in Liptovsk´ Mikul-ö, suggested that a figure in excess of 2,700 students is a conservative estimate of the total throughput of students since the programme was first run, with another 1,600 students who had begun the Enterprise Education programme for the 1997/98 academic year . These figures are based on an average of the figures available for the pilot schools, plus an estimated figure of 30 students per year taking the subject in each of the 54 'second phase' schools which have offered the subject since 1995/96. It must be recognised that the numbers here are a best guess, based on incomplete data.

3.13 Students who complete the programme are awarded a certificate issued by the FEE.

3.14 The TWL element of the project (see para 2.5) was only offered in 1992. Outputs have been documented previously, and no further activity in this field has been undertaken. Some regret was expressed that the module had not been treated in the same way as Enterprise Education, with teacher training attached in order to build local delivery capacity. This was, however, never the original objective, although the material and course have potential for wider application to the unemployed, and to final year students.

### ***Oxford YE Exams***

3.15 Since 1996, any student who has graduated from the Enterprise Education programme is entitled to sit the Oxford YE Examination. Numbers of optants were available from the three pilot schools but neither the pilot schools nor the FEE have records of total numbers of students in Slovakia who opted to sit the examination. The combined figures for the three pilot schools for 1996 and 1997 respectively are 59 optants (pass numbers unavailable) and 182 optants (165 passes).

3.16 This activity will continue, with the FEE coordinating the submissions.

### ***Materials***

3.17 A set of materials, consisting of five manuals, has been developed to support the two-year Enterprise Education programme. Each manual has a specific application and relates to a particular element of the programme or participant role:

- a. Enterprise approaches to teaching and learning

- b. Mini-Enterprise
- c. YE
- d. Enterprising teaching and learning of Economics
- e. Case studies in Enterprise Education.

3.18 The materials have been published and a copy is provided to each school offering the subject. The manuals were not designed to build progressively one on the other, but to be inter-dependent: some providing teaching material, others focusing on methodology. It was therefore not relevant to assess the relative popularity of the manuals, since these served different purposes, nor would it have been possible to do so, given the nonavailability of data on this subject other than through feedback from those interviewed for the evaluation.

3.19 There were some problems associated with developing the materials, specifically in translation and in covering the publication costs. These were not due to the project design but were a consequence of the loss of the Slovak funds earmarked for this task. Additional funding from the KHF enabled the problems to be overcome but the issue of continued funding to update, revise and reproduce materials in the future needs to be addressed. No indicative figures were available, however, at the time of the evaluation.

### ***The Curriculum***

3.20 When Enterprise Education was first run in the three pilot schools in 1993/94, the subject was offered as part of the Optional curriculum. From 1994, the three pilot schools included the subject in the Compulsory-Optional section of the curriculum, amongst a range of options from which students must choose and where, for those students who opt for the subject, it will be part of their compulsory study. Teachers deliver the subject as part of their normal, paid workload, rather than on an unpaid basis, which is the case for Optional subjects. Through a Government Directive, the subject of Enterprise Education has now been included in the national curriculum as a Compulsory-Optional subject, which gives any school in Slovakia (secondary vocational, gymnasium or apprentice school) the right to apply to offer the subject, once their teachers have undergone the requisite training which leads to certification by the IoE. Financial support has been made available by the MoE to provide mainly teacher cover for schools whose teachers are being trained, as follows:

- to May 1994: 560,000 Slovak crowns (c. £11,200)
- 1994/95: 246,000 Slovak crowns (c. £4,920)

- 1995/96: 153,000 Slovak crowns (c. £3,060).

3.21 For the 1996/97 academic year, there was apparently no MoE contribution due to budget pressures. There is a move to reallocate responsibility for school budgets to the Ministry of Internal Affairs. This Ministry's chief concern is to reduce inflation, which would have a consequent negative impact on the resources available for the training of new teachers, and, as a consequence, on the number of schools able to obtain IoE certification to offer the subject.

3.22 However, the MoE endorsement of this project is perceived by the schools and by both UK and Slovak project teams, as a mark of quality assurance not associated with other similar programmes, many of which are materials-based and lack the teacher training/capacity building element.

3.23 One of the Extension project objectives (para 3.1 refers) was 'to incorporate Enterprise Education concepts, teaching and learning styles into other parts of the curriculum, and in particular Economics, which is a compulsory subject in the last two years of all vocational courses, and an optional extra in Gymnasia'<sup>5</sup>. (Objective b in para 3.1 refers).

3.24 The project has successfully met its objective by developing the necessary materials for this purpose but the integration of Enterprise Education concepts and methodologies into Economics has been less successful - at least in the three pilot schools - than in such subjects as Mathematics and English. Economics teachers, who were initially targeted as those for whom training in Enterprise Education delivery would be the most appropriate, have had the greatest difficulty in bridging the gap between the traditional and new content and approaches and some have demonstrated the most resistance. Where inclusion of the modules has taken place, it has been due to the individual teacher's interest but integration has not been achieved on a systematic basis (paragraph 3.10 above refers).

### ***National Competition***

3.25 An annual national YE competition has been introduced for students participating in the Enterprise Education programme, and has been run twice, the first time open only to teams from the pilot schools and in the second year open to any Slovakian school students who have completed the Enterprise Education programme. YE Winners have twice represented Slovakia in the international YE competition,

<sup>5</sup> Source: Project Memorandum, 25 February 1994

where one team came first in its category (New Countries to the Market Economy). The FEE has assumed responsibility for managing the event and future participation in international competition.

### ***The Foundation for Enterprise Education (FEE)***

3.26 This Foundation was established in 1995 as a permanent independent body to promote the programme in Slovakia (and meet objective c, as in para 3.1 above), the Director of the Ruzomberok pilot school taking the role of Director, on a voluntary and part-time basis. The FEE's role was to "maintain the quality of help to find support and sponsorship",<sup>6</sup> specifically to raise funds to support those elements of the programme which required finance; for example for the payment of trainers involved in the dissemination of the Enterprise Education programme to new schools; the participation of students in the international YE competition; and the refinement of programme materials and their updating and production in greater volumes.

Responsibilities also include the organisation of national competitions, sending teams to International Partnership Conferences and to international competitions, the organisation of student participation in the YE European Examination, and the development of awards and accreditation for teachers, students and advisers in this area.

3.27 The FEE is designed to be a partnership between government, business and educationalists and has a board of trustees representing the respective sectors and geographic areas. It was also formed, in part, as a means of managing the uncertainty caused by the changes in the MoE and those which had occurred due to the merging of the IER and the ITT to form the IoE, at the beginning of 1994.

3.28 It was originally hoped to establish a Co-ordinating Group between this Foundation and the Bat'a Junior Achievers Foundation (Slovakia), since they shared similar objectives but this did not prove possible.

3.29 In accordance with new government legislation in 1997, the Foundation was reregistered this year, with a new Board of Directors, broadly embodying the original objectives and responsible for the following activities:

- a. promotion and expansion of the Enterprise Education subject (mainly through fund-raising and networking with appropriate national institutions)
- b. organisation of the competition for YE at a national level

<sup>6</sup> Source: Project Proposal, 25 February 1994

- c. support to students competing in the international competition
- d. co-ordination of the three pilot schools in their provision of consultancy for the school network in Slovakia offering Enterprise Education
- e. refining, updating and republishing of materials
- f. co-operation with businesses/entrepreneurs
- g. involvement in the Phare-funded Hungarian-Slovak Cross Border Enterprise Education project (project approved March 1997 and won and led by members of the UK project team)
- h. organisation of the participation of students in the Oxford YE Examinations.

3.30 Due to the Phare Cross Border project, the Foundation is able for the first time to pay for the services of a full-time Director, who will contribute three or more days a week. One of the original trainers from the Koöice pilot school, has taken on this role. The Foundation, with monies from the Phare project, is also now able to pay the core trainers for their teacher training activity, carried out voluntarily outside their core teaching responsibilities, which had previously relied on their 'goodwill' since the end of the KHF project.

### ***Network of Schools***

3.31 Through teacher training courses, contact through the national competition, and the Oxford YE examination activity, an informal network of teachers in participating schools has been created. There is a proposal to create a more formal association of schools, and for teachers to meet annually in order to refresh know-how, exchange experience and develop links between schools' willingness. A first meeting is planned, but there is currently no funding available, so it will rely on the teachers paying their own expenses for attendance, and on the schools' willingness to allow the teachers the time to attend.

### ***International co-operation***

3.32 Two instances of actual, or potential, dissemination outside Slovakia have occurred:

- a. Hungary: As a separate initiative, funding has been obtained from Phare by some of the members of the UK project team to support the introduction of the Enterprise Education programme into three pilot schools in Hungary, trained and mentored by the three Slovak pilot schools and some members of the UK

project team.

b. Czech Republic: The Slovak pilot school in Nitra co-operates with secondary technical schools for the food industry in the Czech Republic. Czech schools have observed the delivery of the Enterprise Education programme during visits they have made to Nitra and a proposal is being developed to introduce Enterprise Education into these schools, starting in 1998.

### ***Entrepreneurial activity, business start-up and enhanced employment prospects***

#### **Full-time**

3.33 The Slovak legislative system does not permit any individual under 18 years of age to register a business, so the minimum age when Enterprise Education graduates could legitimately start a business would be on graduation from secondary school. It is too soon after the end of the project, and indeed after the first students graduated, for many outcomes to have resulted which might directly contribute to economic activity. In the pilot schools, the first students completed the Enterprise Education programme in 1995 and simultaneously took their Maturita (school graduation examination). Two years had therefore to elapse before the first students would be in a position to apply their learning in a business/commercial environment.

3.34 According to the pilot schools, the majority of students from both gymnasias and vocational schools follow one of four routes, after Maturita, three of which will have precluded the take-up of any entrepreneurial activity before 1997. The first of the students who went to University following secondary school, will not become economically active on a full-time basis until 1999 (approximately 50% of vocational school graduates and 80% of gymnasium graduates). Those male students not attending University are required to do two years' national service, so became potentially economically active in 1997. A third option is to stay at school after the Maturita, to undertake a post-graduate technical specialism (normally two years study) in which case, again, the students would only now be seeking employment or considering entrepreneurial activity. A fourth option is to enter the labour force after graduating from secondary school.

3.35 There will, in any case, continue to be difficulty in making any assessment of ex-students' economic activities because the vocational schools, with their specialist focus, draw students from all over the country, who then disperse once they have graduated. Schools have contact details but do not monitor their ex-students' activities.

### **Part-time**

3.36 There is some evidence of business activity on a part-time basis amongst past students now at university. The tax regime is attractive for university students involved in commercial activity, and several have started up businesses whilst at university. One example is an ex-student from Košice, now at the University of Bratislava's Management Department, who has recently started a software production business following experience working in his father's business and having completed the Enterprise Education programme. This student was interviewed for this evaluation and, whilst recognising his father's activity as a strong influence in his desire to set up a business, emphasised the highly positive contribution, in both motivational and practical terms, that the programme had made.

3.37 Of the 10 past and 19 current students interviewed, the majority of those who were considering setting up their own business in the future had role models and previous experience from their family. However, they recognised that these early experiences had been strongly reinforced and consolidated by the Enterprise Education training, which they believed had given them the tools to validate a business idea and take it through the development process to start-up and beyond.

### ***Local Implementation Groups and Links with Businesses***

3.38 One of the project's less successful aspects had to do with the contacts achieved with local businesses and attempts to involve entrepreneurs in the project in a constructive and practical way. All three pilot schools had difficulties during and after the project in persuading SMEs to co-operate with the project. Local business did provide some instances of involvement and support but generally these were from businesses known to the students (for example, those run by their parents). The Local Implementation Groups set up in each pilot school to harness the local community were more successful although, again, these relied on individuals or organisations that had existing ties with the school.

3.39 The Foundation's objective in taking on responsibility for generating business links is to locate funds to support the continuation and expansion of Enterprise Education dissemination. The UK project team has some concern that the project did not provide sufficient skilling to Foundation staff for them proactively to undertake marketing and fund-raising activity, or to persuade businesses to invest in education, a concept not well established in transitional economies. Nonetheless, some promotional activities have been undertaken, using a variety of media. The process has also been held

up through the legal requirements of reregistering the Foundation, during which time operational activities have been unable to proceed. The registration has now been completed and the Foundation Director's plan is to start targeting companies for sponsorship in the near future.

### ***A model for Enterprise Education***

3.40 A model has been created which can serve, according to one school Director, as a model for the whole of Eastern Europe. The model's merits are that it:

- a. used UK know-how, but was flexible enough in the design of the programme to modify the know-how to customise it for the Slovak situation;
- b. involved the beneficiaries in a very active manner, rather than presenting them with a programme which required their role to be receptive;
- c. included a capacity-building element designed to support sustainability, and captured the key institutions necessary to this process;
- d. developed supporting materials which are very practical and have application to the wider curriculum, which will help transfer the student-centred approach to other subjects.

3.41 The high level of Slovak ownership that the project created contributed to the commitment and goodwill demonstrated by the schools and institutions involved, in taking forward the project after its official end and the end of funding available to support it.

### ***RESULTS MEASURED AGAINST PROJECT OBJECTIVES***

3.42 When the above outputs are considered against the original objectives, the project must be judged to have been an extremely successful intervention. Against all but one of the original objectives, the project has met or exceeded its objectives, and dissemination is on a scale which was not initially envisaged and has continued over a period of time in excess of that planned. An assessment against the specific objectives for both the original and the extension projects is provided below.

3.43 A self-sustaining Slovak Management Team has now been established in the form of the FEE. The FEE's key role is to manage the dissemination of Enterprise Education and its expansion across the Slovak Republic, and to ensure funding is in place to support

these activities. This objective has therefore been achieved.

3.44 Local implementation groups (LIGs) were established in the pilot schools during the project's lifetime. Outside representatives consisted mainly of parents involved in enterprising activities, and local organisations known to the staff and students. The LIGs found it difficult to attract many local businesses in the network and creating the school-industry links was one of the less successful aspects of the project. Two years after the end of the formal project, the situation is the same, although the Foundation has now taken on responsibility for wider networking with industry, but there are concerns that the Foundation's skills and experience in networking and fund-raising are not yet sufficient to achieve much success. Between the pilot schools, the network is still very strong, and there is a movement to establish a formal network for all schools in Slovakia running Enterprise Education.

3.45 All the planned materials were developed by the end of the extension project, and have been professionally printed. A five volume manual now exists to support the Enterprise Education programme which also has application to other subjects, and is being used more widely. The Foundation has responsibility for updating, refining and reproducing the materials and this process has continued in the two years since the project ended. There are plans at present to review the materials again, and to enhance their presentation next time they are reproduced. With the help of the extension project funding, this objective has been fully achieved and can be considered to have been very successful.

3.46 Delivery of the programme and provision of training and support at national and local levels has exceeded expectations in terms of the schools' coverage and student participation achieved across Slovakia. During the original project and its extension, the programme was delivered in each of the three pilot schools; teachers and trainers were trained; and core trainers trained the first cohort of 'second stage' teachers. Since the project ended, the cascading out of Enterprise Education has continued, and each year 18 new schools are added across Slovakia. This process will continue at the same level for the foreseeable future, and there is a waiting list of new schools who have applied to be trained. The key achievements in meeting this objective are the development of local Slovak capacity and a system to support the dissemination of the programme and be sustainable without foreign intervention and funding.

3.47 Through the IoE, a certification system has been developed for teachers who complete the Enterprise Education training provided by the core trainers. This system gives the programme national credibility and a badge of quality, and acts as a control to ensure standards are maintained. There is a need and a demand for some continuing professional development in this field, to maintain quality and to ensure there is no

dilution of the material delivered when it is disseminated away from the core trainers. However, this is a development for the future, and as far as the objective is concerned, an accreditation system has been successfully implemented.

3.48 The targets set for the project were general in nature, and not linked to numeric outputs in any detail. The project approach was evolutionary and milestones were agreed in terms of activities which needed to be delivered by a particular date. In terms of these targets the project was successful and met them on time. There do not appear to have been any rigorously defined quantitative targets (for example numbers of students to be trained, or numbers of teachers and schools to be certified to offer Enterprise Education). However, the pilot schools have themselves set a target of 54 teachers a year to be trained from 18 schools across Slovakia, and the target is currently being met. Since the project's end, no system of monitoring and evaluation has been in place, (apart from evaluation of new teachers through the certification process), and although the core trainers can provide lists of teachers trained, this information is fragmented and is not used for evaluation purposes. The Foundation is the obvious organisation to take responsibility for co-ordinating data and monitoring the Enterprise Education activities in all schools, particularly as the network grows.

3.49 The provision of TWL in 1992/93 met the objective to set up a practical counselling service for 1992 school leavers. The programme was successful in providing business planning training for the target student cohort. This was a discrete element of the project and there were no plans to continue to provide such a service once the full Enterprise Education programme was implemented. The pilot schools were, however, very keen to continue to offer such business planning training, provided the expertise was transferred to the Slovak teachers so as to build an indigenous capacity. No funding was made available for this activity. Despite its short life, TWL did, nonetheless, meet its objective.

3.50 The project has been only partially successful in incorporating the principle of Enterprise Education in the Economics curriculum. The modules were developed during the extension project for inclusion in the economics curriculum and supporting materials were prepared. The involvement, however, of economics teachers in the project has been inconsistent; some resistance to the pupil-centred methods of teaching was encountered; and some difficulties were experienced by teachers in linking the enterprising approach and materials into the more traditional economics curriculum. Whilst the principle has been incorporated in the curriculum, the practice has not been consistently delivered.

3.51 As described earlier, the FEE was established as an independent body in 1995, and reregistered in 1997. It now has funding from the Phare programme to cover the

Director's salary. He has been working nearly full-time for the FEE since September 1997 and is taking on the role of pivotal institution to ensure the continuation of delivery and the cascading process of Enterprise Education over the long-term. The Foundation's operational activities were being held up at the time of this evaluation by the need to reregister as a Foundation but should now be free to proceed.

# 4

## IMPACT AND SUSTAINABILITY

### *MEASURING IMPACT*

4.1 The objectives of the original and extension projects contained few metric targets over and above the objective of establishing three pilot schools. Although the original objectives included 'setting targets for the project and establishing an ongoing programme of monitoring and evaluation against these targets', these targets do not appear to have been defined subsequently in specific numeric terms, nor have they been systematically monitored.

### *QUANTITATIVE IMPACT*

4.2 Within the objectives, two quantitative targets were defined. In the original project, the objective was to establish Enterprise Education in three pilot schools, and this was clearly achieved. Under the extension project, within the objective of 'extending the existing KHF project Enterprise Education in Slovakia ... to ensure its effective dissemination nationally', one of the tasks was to train a number of new schools, to enable them to offer the subject. The pilot schools set a target of six schools from each of the three regions to be trained in 1994/95. This was achieved and the process continued at the same level in the subsequent three years, a total of 54 additional schools having already been trained (163 teachers), and another 18 currently undergoing the certification training.

4.3 As mentioned earlier, the schools have incomplete data and, with regard to numbers of students completing the Enterprise Education programme in Slovakia, these are collected neither by the pilot schools nor the Foundation.

4.4 The following data have, however, been provided. By the end of academic year 1996/97:

- a. 57 schools, including the three pilot schools, in Slovakia had been certified to offer Enterprise Education as part of the Compulsory-Optional curriculum;
- b. within those schools, in excess of 220 teachers had been trained to teach Enterprise Education;
- c. of the 11 teachers originally selected and trained as trainers, eight were still active in disseminating the know-how to new teachers;
- d. In 1992/93, the year that TWL was run in the three pilot schools, 137 students started the programme, 101 completed it, and 59 business plans were produced.

4.5 In addition, although there are no comprehensive data on the number of students completing the Enterprise Education subject, some projections can be made. Based on the figures provided by the pilot schools, and assuming that each of the 54 new schools has a new Enterprise Education intake each year of 30 students (a conservative estimate), by the end of 1996/97 approximately 4,300 students will have either completed or be currently participating in the programme: This, however, is only an estimate.

4.6 For the last two years, students who have completed the two-year programme have been eligible to sit the Oxford YE examination, and 241 students have taken this, of whom 195 passed, with at least two achieving 100% scores. A teacher has been trained as a YE Examiner in order to participate in the processing of the examination papers.

4.7 The financial input to achieve the results described in Chapter 3 is documented as being £318,124, plus a contribution of £19,180 from the Slovak Ministry of Education over the three years 1994-97 to cover some expenses relating to training teachers.

4.8 The budget structure and reporting format used by this project render it difficult to attribute, in detail, expenditure to the various strands of the project, and therefore to identify any direct links between inputs and outputs other than on an aggregated basis. However, an attempt has been made to split the expenditure between (i) spend to establish an infrastructure (original project) of £176,000, and (ii) spend to disseminate the know-how and skills to a wider school population in Slovakia (the extension project) of £125,000. Nonetheless, the extension phase also contained infrastructure development costs to support the work involved in establishing the Foundation for Enterprise Education; and the original project includes spend to cover both the mentoring of training activity within the pilot schools and the delivery of TWL, (a discrete delivery element which did not feed into the Enterprise Education infrastructure).

4.9 Given the dependence of the dissemination phase on having established a sound infrastructure (i.e. the first students would not have been able to be trained without the programme being designed, the materials developed and the teachers trained), the best allocation of outputs to inputs which can be extrapolated from the available data is the following: for a spend of £318,124:

- a. an estimated 4,300 students have been trained, or are being trained;
- b. 220 teachers have been trained to teach Enterprise Education and have received certificates issued by the Institute of Education;
- c. 57 schools are qualified to offer Enterprise Education in their curriculum, with another 18 being added this year;
- d. The subject has been included in the national Compulsory-Optional curriculum.

In addition:

- e. A teacher has undergone training and qualified as an Oxford YE Examination assessor;
- f. 241 students have sat the Oxford YE Examination;
- g. The Foundation for Enterprise Education has been established.

4.10 A unit cost analysis is not possible because the costs cannot be broken down and apportioned according to the above activities, but if the training of students is considered to be the primary activity, with the other strands of the project supporting this, then a crude per capita cost of £74 to train each student can be calculated. Given the broad remit of the project, and the wide portfolio of activities undertaken, this figure is not meaningful and will clearly be much lower when the spend is spread across the other activities as well.

### **Comparisons**

4.11 Applying the DFID's guidelines for evaluating the project on a 'with versus without'<sup>7</sup> basis, if the project had not been funded, the schools would not be offering Enterprise Education to students, and the subject would not have become embedded in

<sup>7</sup> Reference: ODA Evaluation Studies: Guidelines for Evaluators, August 1994, page 5, paragraph 3.3

the national Compulsory-Optional curriculum. There are alternative, similar programmes, the main one being Bat'a Junior Achievement. However, the Bat'a programme is part of the Optional curriculum, and although run in approximately 150 schools in Slovakia, and expanding, Bat'a Junior Achievement had not, at the beginning of the project, been offered to the three pilot schools.

4.12 Second, Enterprise Education differs from the Canadian-supported Bat'a Junior Achievement and other Swiss and German-funded projects being offered in Slovakia in that it is the only one which has put a structure in place and built capacity locally so enabling it to ensure sustainability without foreign funding or expert input.

### ***Cost effectiveness***

4.13 In terms of assessing whether this project was delivered in the most cost-effective way, several issues need to be taken into account:

- a. an achievement by the KHF in awarding the contract was the apparent negotiation of a reduced fee rate with all the UK Project Team of £250 per day for work carried out in the UK, and £330 for work carried out in Slovakia. This compares with a normal day rate of between £500 and £1,250. The result was a minimum reduction in the budgeted cost of the total project (original and extension) of £137,000 (336 days delivered in the UK at £250 instead of minimum £500; 314 days delivered in Slovakia at £330 instead of minimum £500).
- b. accommodation and travel costs in Slovakia were covered by the Ministry of Education in Slovakia, rather than the normal practice of these costs being covered by the project funding, and the per diems paid throughout the project were consequently substantially lower than the norm for this type of project. Travel and accommodation costs were minimised by undertaking travel, it seems, on non-contract days and staying in school students' hostels rather than hotels.
- c. As noted earlier (paragraph 2.31) a view was offered that the project could have been delivered by a smaller UK team but one of the key contributing factors to the richness of the project was the mix of expertise embodied in the UK team, achieved by drawing on five organisations which brought a wide span of perspectives and previous experience to the project. Using a smaller team would have reduced that richness of input. In addition, whilst the size of the team could have been reduced (at a cost to quality), the UK team's input in terms of consulting days would not necessarily have been less.

Indeed, the feedback from the Slovak pilot schools was that they would have appreciated a greater presence and more intensive input from the UK team. Specifically, there are two areas which would have benefited from greater reinforcement, over a longer period, from the UK team:

- Dissemination: there is a danger of some dilution of the original concepts of enterprise education taking place as the training is cascaded out. Whilst the original Slovak trainers demonstrated an excellent understanding of the conceptual underpinning of the project and material, and have acquired the training skills necessary to train other teachers, the lack of experience gained from operating within an established enterprise culture, and the absence of practical experience in applying principles in a business environment, is likely to affect the quality of training as it is disseminated. A longer period of mentoring and/or 'refresher' courses are mechanisms which would contribute to sustaining the quality of the dissemination process.
- the UK team identified an area where they felt more effort earlier on their part would have prepared the Slovak team better. Fund-raising activities, and associated school-industry links with UK and Slovak businesses started in earnest only six months before the end of the project. This process should have been designed to start earlier and to include a greater concentration on skilling the relevant Slovaks. The current situation is that whilst the Slovak staff understand that they must undertake fund-raising activities, they are insufficiently skilled or confident to put this into practice effectively, and the process has consequently been less successful than it might have been.

Both these activities imply the need for a greater involvement and effort by the UK team, rather than less.

4.14 This links with the issue raised about the appropriate cut-off point for foreign donor-funded projects. Future projects would benefit from inclusion of provision for an element of 'hand-holding' during the initial implementation phase, to ensure the expertise has been successfully transferred at both a theoretical and a practical level. In the Enterprise Education project, mentoring was delivered for the training dissemination activities but was insufficiently available to ensure the support system and processes were made sustainable.

## **QUALITATIVE IMPACTS**

4.15 This section comments on the project outcomes and attempts to assess the resultant impact of these changes. It is the evaluators' view that all these outcomes are due solely to the project and can therefore be considered to be 'value added' by the intervention. We have been mindful of the DFID's guidelines to carry out a 'with versus without' rather than a 'before versus after' analysis, and whilst it is possible that an alternative project might have been provided if the KHF project had not been available, it is by no means certain. Given the level of know-how transfer achieved which, in the view of all the key stakeholders, exceeded expectations, it is hard to see how such changes could have been effected without this project intervention. We feel confident, therefore, in judging that all impact is a result of the project rather than change which coincidentally took place in the project period.

4.16 Assessments of impact in each of the key areas and relevant linkages with the original project objectives are set out below.

### ***Changes in the curriculum***

4.17 Arguably the most significant impact of the project has been the inclusion of the Enterprise Education subject in the national Compulsory-Optional curriculum. An assessment by one of the key partners was that this was an extraordinary step because in order for this to have happened, "a Ministerial decision had to have been made about promoting the concept of enterprise, in a country which is not yet quite sure it has signed up to it". The significance of this change is that the project's positive impact in Slovakia has been not only at a school level but also at a macroeconomic level, where the government, by including the subject in the curriculum, has made a conscious response to societal, political and economic changes in Slovakia.

4.18 It is not possible to calculate how much the new enterprise initiatives, including Enterprise Education, have driven the pace of change in schools, or whether the pressures of social and economic change have led the education infrastructure to adopt reforms to the curriculum. The schools, however, were driven by the need to address the deteriorating employment conditions caused by the political and economic changes, and any other similar programme available in Slovakia which they may have subscribed to as an alternative, has not resulted in inclusion in the Compulsory-Optional curriculum.

### ***Institutional level changes***

4.19 The project has gained a momentum which is now independent of foreign support, either in the form of funding or of expertise. At a national institutional level, and in particular in the MoE and the IoE, the positive support given to ensure (i) that funding is available to contribute to the costs of dissemination to schools throughout Slovakia, and (ii) that the subject remains in the Compulsory-Optional curriculum, represents a recognition of the benefits of the new subject and methodologies embodied in Enterprise Education.

4.20 How much this change in attitude resides in individuals rather than institutions is unclear but even though different people are now responsible for the project in both the MoE and the IoE, active support for the project has not diminished. There has been only one change in responsibility within the MoE since the project's inception and the Ministry representative who currently has responsibility for the project in the MoE, as Director for Secondary Schools, confirmed that the Ministry considered it to be "one of the best initiatives in the responsibility of the Ministry of Education".

4.21 The Foundation for Enterprise Education has highlighted the need to ensure continuation of support relies on a system rather than on an individual, which should lead to a strengthened infrastructure and greater certainty about longer term sustainability.

### ***Development of enterprising characteristics***

4.22 The project objectives were all about changing attitudes and developing the characteristics necessary to achieve successful operating in a market economy, whether as an individual employed in a business or as somebody running one.

4.23 Whilst the ultimate impact of such a project must be measured in terms of economic activity, i.e. improved employability or increased business creation or job creation, the objectives of this project, and the implicit measures were less tangible. Identifying the impact of the project in terms of behavioural or attitudinal changes was addressed using a qualitative approach. To determine what changes had resulted from participation in the programme, the evaluators relied, first, on observations from those key contributors to the programme who had had the closest contact with the students and the opportunity to observe the process over the length of the project and, second, on feedback from the students.

4.24 The UK project team, the school directors, teachers and a selection of past and present students in Slovakia were asked whether they could identify, first, characteristics

and behaviour which differed noticeably from that of students who had not participated in the Enterprise Education programme (the closest simulation of a control group, in the absence of a mechanism set up at the project's start); and, second, characteristics and behaviour present at the end of the programme which had been less pronounced or absent at its beginning.

4.25 The following characteristics were identified as being common in Enterprise Education students, as a result of having participated in the programme:

- increased confidence
- pride in work
- a strong desire to succeed and to 'be the best'
- improved communication skills
- development of presentation skills
- awareness of the importance of, and development of team roles, team building and teamworking skills
- independence and self-governance
- greater motivation
- enhanced organisational skills
- the ability to delegate
- trust

4.26 In addition, functional skills in key business areas, particularly in finance and marketing, had been developed and a clear practical understanding of the role, purpose and application of these functional skills were present in the students interviewed.

4.27 A wider effect of the education, and in particular the practical experience of setting up and running a business through YE, was the awareness and understanding the students demonstrated of the realities of running a business. An example of this was the understanding of the rationale for pricing described by a Koöice student, and the consequent softening of her attitude towards local traders and prices charged.

### ***Student-Teacher relationships***

4.28 According to the teachers interviewed, their attitudes to students have changed. They have developed, through the project, a more interactive relationship with the students, and have gained respect for the students' abilities through their involvement with them in a style which did not occur when using more traditional training methodologies, where the transfer of knowledge was unilateral and dialogue and interaction were not encouraged. The result has been a greater openness in teacher-student relationships and a move towards the students being placed at the centre of their own education process and encouraged to take responsibility for their own learning.

### ***Techniques and methodologies - application to the wider curriculum***

4.29 The move from didactic teaching to a pupil-centred approach has been achieved in delivering the Enterprise Education programme. In all three pilot schools, and in the 'second stage' school in Liptovský Mikuláš the Enterprise Education teachers - who all had other subject specialisms - confirmed that the subject matter, the teaching 'tools' (for example, exercises contained in the training manuals), and the teaching methodologies transferred to them in the programme, had relevance and application in the wider curriculum. Teachers are actively applying and integrating the material into other subjects. For example, in Košice, examples were given where exercises were adapted for mathematics and English teaching; and in Nitra, the Director stated that "although the school timetable remains unchanged, the quality of the lessons is different". The application of know-how to other subjects was considered by the Slovaks to be a very important result of the project, and demonstrates the success of the intervention in terms of effecting broader cultural change in the Slovak education system.

### ***Pump priming other projects***

4.30 The award of the Phare project to provide further support to the Slovak Enterprise Education initiative, in conjunction with supporting know-how transfer from Slovakia to Hungary to develop Hungarian capacity to deliver Enterprise Education, is the result, at least in part, of the KHF investment in the Enterprise Education project. Often, the international donor organisations are influenced in their decision to support a project by previous success being demonstrated in that sphere; and relatively small sums invested by the KHF can make an invaluable contribution as a 'pump priming' mechanism for accessing larger tranches of funding.

## ***SUSTAINABILITY***

4.31 One of the key objectives of the original project was 'to build a self-sustaining Slovak Management Team (SMT) to facilitate the development, implementation and dissemination of the pilot project and subsequently to supervise its expansion across the Slovak Republic'.

4.32 Two years after the project officially ended, the delivery of the subject in certified schools continues, the dissemination of the subject to new schools continues, and several steps have been achieved to ensure that the development of an enterprise education culture in secondary schools in Slovakia will continue, subject to the vagaries of the volatile political and economic environment in Slovakia. The key building blocks put in place to sustain the initiative include a system of teacher training, inclusion of the subject in the Compulsory-Optional national curriculum, a certification system to ensure that standard quality levels are delivered in new schools, a common set of materials, and establishment of the FEE.

4.33 Whilst the success of the project in establishing a sustainable infrastructure is recognised, a number of external factors have contributed to the continuing success following project completion, without which the long-term existence of the initiative may have been threatened. These must be acknowledged in order that any future project can take account of these issues and address them:

- a. The commitment of the training team from the three pilot schools to continue to provide teacher training without remuneration. After the conclusion of the KHF project, the initiative relied on trainers delivering training without any financial return (apart from a bonus paid by the Director of one school to its core training team in recognition of their extracurricular activities). This has now been partly rectified through funding from the Phare Cross Border project, and it is hoped FEE will access sufficient financial support to continue this. However, without the considerable 'goodwill' of the trainers, the dissemination of Enterprise Education would not have continued, at least not on its current scale.
- b. Similarly, the members of the UK project team have continued their contact with the pilot schools and key members of the Slovak Management Team, providing some input and considerable encouragement without remuneration. In some cases, this has been achieved on the back of other activities in which they are involved in Slovakia. Most important, some of the members of the UK team have secured the funding from Phare which has paid for establishing and consolidating the structures necessary to sustain the project. Part of the problem here was the fact that the original and extension projects did not have an inbuilt dissemination strategy, which addressed the need to skill the Foundation sufficiently to carry the project forward.

4.34 In future, a number of additional issues will need to be addressed to ensure sustainability:

- a. There is currently no system for 'refreshing' the core trainers' knowledge and skills, and replacing trainer loss. In order to ensure long-term sustainability at current levels, or to expand dissemination to meet demand, there needs to be an ongoing system of trainer development.
- b. The roles of the key institutions associated with the project (MoE and IoE) may be reducing in importance, and the view was expressed that the initiative has become sufficiently embedded in the Slovak education culture now that it would survive without the involvement of these two institutions and, indeed, this year the programme is receiving no direct MoE funding. However, there still remains the need to ensure the subject is included in the curriculum year by year, which relies on a formal relationship with the MoE and IoE. Similarly, certification is issued by the IoE.
- c. The contact in the MoE appears to be a critical relationship and both the previous Director of Secondary Education and the current one are personally very supportive of the initiative. This, at least in part, appears to be a personal commitment to the project, and it is not clear whether there is a sufficiently robust MoE system to ensure continuing commitment if the holder of the Directorship of Secondary Schools changes in the future. Without that contact, it is conceivable that the funding stream, such as it is, and the inclusion in the national curriculum may both suffer. It is, however, recognised that whilst reliance on a system rather than an individual would be desirable, in a society which is in the process of dismantling and redesigning its systems, reliance on individuals may be necessary for the foreseeable future.

### ***CROSS-CUTTING ISSUES***

4.35 The evaluation is specifically charged with identifying impact in three areas: on women; on the ecological environment; and on poverty.

4.36 The evaluators addressed the cross-cutting questions raised in the Evaluation TORs, but the project was such that it had no in-built, direct gender-specific, environmental or poverty-related objectives and the intervention had no measurable outputs, in any of these areas, which can be categorised as having had an impact.

4.37 Specifically, due to the absence of detailed data regarding participants, no gender breakdown of students, or teachers, exists. Of the teachers interviewed by the evaluators,

more were female than male, but that may well reflect the overall breakdown of the teaching staff in the schools. The students interviewed were approximately 50% male and female but again this may be a reflection of the general split of the students, and in neither case can conclusions be drawn from these observations.

4.38 Although the alleviation of poverty was not an explicit part of the project objectives, the preparation of the school leavers for work in a market economy would have been intended to make them more employable and productive, and therefore less likely to slip into poverty once they joined the labour force. Again, given the lack of data on students' activity once they had left school, it is not possible to provide concrete evidence of any positive or negative impacts relating to poverty alleviation.

## TERMS OF REFERENCE

### I. OVERALL PURPOSE OF THE EVALUATION

1. to assess, in terms of fulfilment of objectives and overall impact, the effectiveness and success of ODA's assistance through the Know-How Fund to the Enterprise Education Programme in Slovakia;
2. to arrive at a judgement as to whether the costs of the assistance programme can be justified by its measured or perceived benefits;
3. to draw out lessons from the experience of the programme and draw appropriate conclusions which can be applied to future phases or components, or to similar programmes elsewhere.

### II MAIN OBJECTIVES OF THE EVALUATION

4. to assess in general how far the objectives of the assistance programme have been, or are being, realised in terms of the sustainable inclusion of enterprise development in the Slovakian education system;
5. to assess whether the original objectives were correctly identified in relation to the overall programme goal, and if not what steps were taken to refocus the assistance during the course of the programme;
6. to assess all aspects of the immediate and wider direct and indirect impact of the assistance, whether economic, social or institutional, highlighting gender-related or poverty-related aspects where relevant, and if possible reviewing evidence on the consequent development of the small industries sector.
7. to establish how far the views of the various local stakeholders were sought and taken into account during the planning and implementation of the programme.
8. to assess whether, overall, the assistance was the most cost-effective means of helping to achieve the objectives of the Programme.

### III APPROACH

9. The evaluation will be carried out in accordance with the standard Guidance Notes provided by Evaluation Department and making full use of the Project History.

10. The evaluation will focus primarily on the immediate and wider impact of the assistance and on judgements of overall success, cost-effectiveness and value-for-money. Issues relating to identification, design, appraisal and implementation of the assistance programme are important but should be considered primarily in the context of the impact findings (as detailed in “6” above); in these respects the evaluators should consider the following aspects, as relevant:

#### ***Identification, Design and Appraisal***

- a. how the programme was identified as a priority area for financing;
- b. how far and how well Logical Framework or comparable techniques were used in managing the programme and monitoring the achievements of objectives;
- c. how far the programme conformed with the broader policy priorities of the Government of Slovakia;
- d. the criteria used to select programme personnel;
- e. whether adequate conditionality was attached to the assistance;
- f. how effective were the channels and methods used for this type of aid, how far they might be improved, or which alternatives might be considered in future;
- g. the extent and effectiveness of the strategies adopted by the assistance programme to bring about effective institutional strengthening at all levels, wherever this was needed;
- h. whether the assistance programme met its targets for physical implementation and how accurately those targets reflected the potential for achievement; and if targets were not met, the main reasons for under-achievement;
- i. whether monitoring and review procedures were adequate and appropriate, including whether the reporting systems were effective in systematically feeding back advice and recommendations to (i.) the project managers, (ii.) the beneficiaries;
- j. the level of co-operation provided by the recipients and how far any conditions attached to the assistance programme were fulfilled;

- k. the quality and appropriateness of advice provided by programme personnel at all levels;
- l. whether programme design was sufficiently flexible to take into account changing circumstances and assumptions;
- m. whether the risks at each stage were properly assessed and acted upon.

#### ***IV REPORTING***

11. The evaluators will submit to Evaluation Department a draft report on its findings within eight weeks of commencement of the work (including the field visit) and may be required subsequently to make amendments to the draft in the light of comments received from within and outside the ODA. They may also be required to attend a meeting of the ODA Projects and Evaluation Committee if the latter chooses to consider the evaluation in detail.

Evaluation Department

April 1997



## ANNEX B

### LIST OF PEOPLE CONSULTED

		<b>Date of Meeting</b>
<b>UNITED KINGDOM</b>		
Simon Robbins	Evaluation Department, DFID	16 July 1997
Chris Smart	JAD, Know-How Fund	8 August 1997
Mike Goodfellow	EATE	28 October 1997
Richard Martineau	Education Adviser to LEntA	28 October 1997
David Clark	BITC (and formerly of METEL)	29 October 1997
Jack Peffers	SCIP	17 October 1997
<b>SLOVAKIA</b>		
Simon Williams	Know-How Fund, Bratislava	30 September 1997
Emilia Kapralová	Ministry of Education	30 September 1997
RNDr. Jana Štubňová	Ex-Institute of Education	30 September 1997
Silvia Matušová	Ex-Institute of Education	1 October 1997
Ján Krištín	Ex-Institute of Education	1 October 1997
Oldrich Vanous	General Director, Bat'a Junior Achievement	1 October 1997
Košice: Technical School for Metallurgy (Stredná priemyselná škola Hutnícka)		
Ladislav Mako	Director	2/3 October 1997
RNDr. Katarína Kalincáková	Core trainer, and Biology teacher	
Ing. Magdaléna Lukáčová	Core trainer, and engineer	
Ing. Mikuláš Popovic	Core trainer and engineer	
RNDr. Janka Sušilová	Director of the Foundation for Enterprise Education, core trainer and Mathematics teacher	
Team of 9 current students		
Branislav Sušila	Past student	
Miroslav Daniš	Past student	

Nitra: Technical School for the Food Industry  
(Stredná priemyselná škola potravinárska)

Mgr. Jaroslav Macek	Director	7 October 1997
Mrs Balaková	Core trainer	
3 Current students		

Ruzomberok: Technical School for the Textile Industry  
(Stredná priemyselná škola textilná)

Robert Bardy	Director	8/9 October 1997
Mgr. Marta Tyrolová	Core trainer and English teacher	
Marta Brtkova	Core trainer and English teacher	
Vladimir Tauber	Enterprise Education teacher and weaving specialist	
Maria Priesolová	Enterprise Education teacher and economics teacher	
Team of 8 past students		
Team of 7 current students		

Stredná priemyselná škola stavebná, Liptovský Mikuláš

Ing. Anna Devecková	School Director	9 October 1997
Two Enterprise Education teachers		

### **HUNGARY**

Alison Lys	Current position: Residential Adviser to the Ministry of Labour (telephone interview) in Hungary (seconded to KHF by DfEE on an ODA contract)	31 October 1997
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## **UK PROJECT TEAM**

### ***London Enterprise Agency (LEntA)***

LEntA is a not for profit organisation funded by 20 major companies with the objective of promoting small business development and self employment in London. It also promotes the development of school industry links, and was responsible for bringing the first school compact to the UK, a programme subsequently adopted by Government.

### ***Enterprising Approaches to Teacher Education (EATE)***

EATE was originally funded by the Department of Trade & Industry (DTI) and was formed to improve teacher training with respect to enterprise education. It is now a programme of development within Janet Jones Associates, a private firm of consultants specialising in Industry Education links.

### ***School Curriculum Industry Partnership (SCIP) and Mini-Enterprise in Schools Project (MESP)***

SCIP was originally funded by the schools council, Confederation of British Industry (CBI) and the Trades Union Congress (TUC) and was formed to promote industrial understanding in schools. MESP was originally funded by National Westminster Bank and the DTI to promote concepts of Enterprise in schools. The two merged and are now part of the Centre for Education and Industry at Warwick University. It is running a programme for schools in Hungary.

### ***Young Enterprise (YE)***

YE is a not-for-profit organisation largely funded by the private sector which runs programmes similar to those being developed in Slovakian schools throughout the UK. It has a regional network of business led management boards. YE is also running a programme in schools in Hungary.

### ***Merseyside Skill Centre***

Merseyside Skill Centre is part of Merseyside Education Training Enterprise Limited (METEL).



## ANNEX D

### KEY DOCUMENT REFERENCES

<i>TITLE</i>	<i>DATE OF ISSUE</i>
Project proposal for delegation to CSFR	August 1991
Report mission to CSFR, 14-17.10.91	28 February 1992
Project Memorandum	18 August 1992
Action plan	10 December 1992
Project Memorandum	25 February 1994

### *TERMS OF REFERENCE FOR EXTENSION PROJECT*

Extension Project Proposal	1 May 1994
Project Memorandum	27 May 1994

### *REVIEW OF THE PERIOD AUGUST 92 TO APRIL 94*

Enterprise Education in Slovakia: Final Report	13 June 1995
Enterprise Education Slovakia, Project History	December 1996



## ANNEX E

## SCHEDULE OF PROJECT VISITS: 1991 TO 1995

Date	Purpose	Locations	Visitors
October 1991	<ul style="list-style-type: none"> <li>To introduce ideas about enterprise education to the Federal Ministry of Education and National Ministries of Education.</li> </ul>	Prague Bratislava	Martineau Clark Goodfellow Halwood Slater
August 1992	<ul style="list-style-type: none"> <li>To discuss the features of the first steps of the KHF agreed project.</li> </ul>	London Oxford Warwick Liverpool Halifax	Kristin
September 1992	<ul style="list-style-type: none"> <li>To introduce enterprise education to the pilot schools in terms of both strands of the project (Enterprise Education and Transition to Working Life).</li> </ul>	Slovak pilot schools	Clark Goodfellow Peffer Sankey
October 1992	<ul style="list-style-type: none"> <li>To visit examples of enterprise education in the UK in terms of both strands of the project.</li> </ul>	London Oxford Liverpool Halifax	Mako, Bardy, Macek ( <i>Headteachers of pilot schools</i> ) Tyrolova, Godachikova ( <i>English teachers</i> ) Bencho, Susilova ( <i>teachers</i> ) Kapralova (Ministry of Education) Stubnova (Institute of Research)
November 1992	<ul style="list-style-type: none"> <li>To finalise KHF contract.</li> </ul>	London Oxford	Kristin Gabco Herber
November 1992	<ul style="list-style-type: none"> <li>To introduce Business Start Up materials to Year 4 (18 year olds) students wishing to create a business plan in their last year at school. (Transition to Working Life)</li> </ul>	Slovak pilot schools	Clark
January 1993	<ul style="list-style-type: none"> <li>To discuss first thoughts of a business plan. (Transition to Working Life)</li> </ul>	Slovak pilot schools	Clark
February 1993	<ul style="list-style-type: none"> <li>To offer advice to first draft of business plans. (Transition to Working Life)</li> </ul>	Slovak pilot schools	Clark
February 1993	<ul style="list-style-type: none"> <li>To lead first training session for students and teachers (Enterprise Education)</li> </ul>	Slovak pilot schools	Goodfellow Peffer Sankey
March 1993	<ul style="list-style-type: none"> <li>To offer advice regarding business plans. (Transition to Working Life)</li> </ul>	Slovak pilot schools	Clark
May 1993	<ul style="list-style-type: none"> <li>To run second training session for teachers and to select group for further training as trainers. (Enterprise Education)</li> </ul>	Slovak pilot schools	Goodfellow Peffer Sankey Saunders (DTI)

<b>Date</b>	<b>Purpose</b>	<b>Locations</b>	<b>Visitors</b>
May 1993	<ul style="list-style-type: none"> <li>To award certificates to those who completed business plans and to give a prize to the best plan in each pilot school. (Transition to Working Life)</li> </ul>	Slovak pilot schools	Clark Saunders (DTI)
June 1993	<ul style="list-style-type: none"> <li>To review progress of the project with Slovaks from pilot schools and Institute.</li> </ul>	Bratislava and pilot schools	David Spence (FCO/ODA/JAU)
August 1993	<ul style="list-style-type: none"> <li>To reward the success of Slovak students.</li> </ul>	London Liverpool Manchester	Slovak Prizewinner of Business Plan (Transition to Working Life)
September 1993	<ul style="list-style-type: none"> <li>Introduce YE to pilot schools. Discuss ideas for an extension year.</li> </ul>	Bratislava and pilot schools	Martineau Sankey
October 1993	<ul style="list-style-type: none"> <li>Dissemination in pilot schools.</li> <li>Training of trainers.</li> </ul>	Slovak pilot schools	Goodfellow Peffer
March 1994	<ul style="list-style-type: none"> <li>Dissemination in pilot schools.</li> <li>Training of trainers.</li> <li>Materials development.</li> </ul>	Slovak pilot schools	Goodfellow Peffer Sankey
May 1994	<ul style="list-style-type: none"> <li>Training of trainers.</li> <li>Materials development.</li> <li>Slovak Ministry of Education approval for KHF extension proposal.</li> <li>1st National Dissemination of the work of the project.</li> </ul>	Slovak pilot schools and Bratislava	Goodfellow Martineau Peffer Sankey
October 1994	<ul style="list-style-type: none"> <li>Dissemination to new schools by Slovak trainers supported by UK Team.</li> <li>Fundraising.</li> </ul>	Slovak pilot schools Bratislava	Goodfellow Peffer Sankey
November 1994	<ul style="list-style-type: none"> <li>Dissemination to Apprentice schools.</li> <li>Fundraising.</li> </ul>	Bratislava	Goodfellow Peffer Sankey
January 1995	<ul style="list-style-type: none"> <li>To begin to set up Foundation and to seek business interest in it.</li> </ul>	Bratislava	Goodfellow Sankey
February 1995	<ul style="list-style-type: none"> <li>To set up the legal basis for the Foundation and business investment in it.</li> <li>To support training of new teachers by Slovak trainers.</li> </ul>	Pilot schools Bratislava	Goodfellow Sankey Peffer
March 1995	<ul style="list-style-type: none"> <li>To set up the Foundation and business investment in it.</li> </ul>	Bratislava	Goodfellow Sankey
March 1995	<ul style="list-style-type: none"> <li>Materials development.</li> <li>Training of trainers.</li> </ul>	Pilot schools	Peffer
April 1995	<ul style="list-style-type: none"> <li>Materials development.</li> <li>Supporting trainers.</li> <li>Seeking business investment in Foundation.</li> </ul>	Pilot schools	Peffer
April 1995	<ul style="list-style-type: none"> <li>Seeking business investment in the Foundation.</li> <li>Finalising the legal status of the Foundation.</li> </ul>	Bratislava	Sankey Goodfellow
May 1995	<ul style="list-style-type: none"> <li>Training of trainers.</li> <li>Certification of trainers.</li> <li>Certification of teachers.</li> <li>Launch of Foundation.</li> </ul>	Pilot schools  Bratislava	Goodfellow Martineau Peffer Sankey
September 1995	<ul style="list-style-type: none"> <li>Report to FCO on progress.</li> <li>Develop Phare bid.</li> <li>Conduct research interviews.</li> </ul>	Pilot schools Bratislava	Peffer

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