

**CRITICAL THINKING RESEARCH REPORT
NETWORK OVERVIEW**

Evaluating self-reported data

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TABLE OF CONTENTS

1	INTRODUCTION.....	5
1.1	Background.....	5
1.2	Aim of the Study	6
1.3	CT Study Design and Data Collection Methods	6
1.4	Limitations of the Data.....	7
1.5	The Structure of Scaling Up	8
1.5.1	The Categories	8
2	PRE-SERVICE AND IN-SERVICE TEACHERS TRAINED.....	9
2.1	Pre-service training largely untracked by NGOs.....	10
2.2	Conclusion/Recommendation.....	10
3	SELF-REPORTED COUNTRY IMPLEMENTATION PHASES AND OTHER TARGET GROUPS TRAINED.....	11
3.1	Program Phase Reported.....	11
3.1.1	Phases as defined in the Questionnaire	11
3.2	Other Target Groups Trained	14
3.2.1	Target Groups Trained Inside the Formal Educational Sector	15
3.2.2	Target Groups Trained Outside the Formal Educational Sector	15
4	THE FORMAL EDUCATIONAL SECTOR: PAST ACHIEVEMENTS AND FUTURE GOALS.....	16
4.1	Achievements in the Area of School Curriculum.....	16
4.1.1	General Statements.....	17
4.1.2	Specific Examples	17
4.1.3	Informal Observations	18
4.1.4	Additional Questions and Concerns Raised Regarding Involvement in School Curriculum – Tracking Practice and Continuous Professional Development.....	18
4.1.5	Future Goals – School Curriculum.....	19
4.1.6	Recommendations: School Curriculum.....	20

4.2	Textbooks	21
4.2.1	Strong Link between CT Participants/Trainers and Textbook Authorship/Development	21
4.2.2	Further Developments	21
4.3.3.	Future Goals: Textbooks	21
4.3.4	Conclusion/Recommendation	22
4.4	Examination/Assessment System.....	22
4.4.1	A Zone of Discomfort?.....	22
4.4.2	Future Goals.....	23
4.4.3	Conclusions/Recommendations	23
4.5	Pre- & In-Service Teacher Training.....	24
4.5.1	Future Goals Pre-Service & In-Service Teacher Training.....	24
4.5.2	Pre-Service & In-Service Training – Conclusion/Recommendations.	25
4.6	Other Achievements.....	26
4.7	Conclusion/Recommendations – Formal Educational Sector.....	26
5	ACHIEVEMENTS AND INSTITUTIONAL ROLE IN NATIONAL EDUCATIONAL REFORM/POLICY	27
5.1	Educational Policy –Levels of Involvement.....	27
5.2	Conclusion/Recommendations	28
6	UNDERSTANDING OF THE PRIORITIES OF THE OSI NATIONAL FOUNDATIONS IN RESPECTIVE COUNTRIES.....	28
6.1	Conclusion.....	30
7.	PROJECTS ACHIEVED OUTSIDE THE FORMAL EDUCATIONAL SECTOR:.....	30
7.1	Overview.....	30
7.2	Teacher Leadership	30
7.3	Youth	30
7.4	Other Areas	31
7.5	Active Respondents	31
7.6	Less Active Respondents	31

7.7	Conclusion.....	32
8.	FUTURE GOALS OUTSIDE FORMAL EDUCATIONAL SECTOR.....	32
8.1	Overview.....	32
8.1.1	Information Technology Capacity Building Tool	32
8.1.2	Publishing and Media/Increasing Awareness of CT	33
8.1.3	Museums.....	33
8.1.4	Continuous Professional Development.....	34
9.	RECOMMENDATIONS	35
10.	REFERENCES.....	38
	APPENDIX A: BLANK QUESTIONNAIRE	39
	APPENDIX B REQUEST FOR PROPOSALS, SMALL GRANTS INITIATIVE.....	44
	APPENDIX C: SPREADSHEET/NOTES FROM QUESTIONNAIRES AND PROPOSALS	49

1 INTRODUCTION

1.1 *Background*

In 1997, international experts from the Critical Thinking Project (CT) (known at the time as the Reading and Writing in Critical Thinking program [RWCT]), began delivering a direct service program of staff development teacher training programs to master teachers. These local teacher-trainers in turn trained thousands of teachers in their own countries. Eventually, CT training was established in almost 40 countries with the aim of establishing “classroom practices that promote[d] active inquiry, student-initiated and community-based learning, problem solving, critical thinking and cooperation¹.”

Later, in 2000, in an effort to build local capacity, CT began delivering its training programs by means of locally based NGOs (spin-offs). These training programs continued to enjoy acceptance and growth in local teaching communities

Noting the smooth transition of CT training programs to the NGOs, CT began introducing new strategies that called for “major revisions and expansions²” to the program; their goal was to expand and transform CT from a “simple training delivery project” to one that had “an active policy component” able to “deliver transformative results across education systems³.” Many of the NGOs then set to work, taking steps to bring about this change with the hopes of taking their organizations to this next level.

¹ How Students Learn: A Statement of First Principles

² Critical Thinking Program: Strategy 2009-2010

³ ESP Strategy – 2010-2011

1.2 *Aim of the Study*

Achieving this transition has not been entirely without difficulties. In fact, it was discovered that one crucial consequence of the original spin-off process was a loss of communication between the network NGOs and ESP/CT that served to weaken their relationship. This caused it to be more difficult for the NGOs to receive the critical support they needed during their expansion.

Therefore, recognizing this loss of communication, ESP/CT determined that it was essential to re-establish contact with the network NGOs in order to identify the key challenges they faced and the priorities they needed to put into place to ensure that their expansion and transformation would be successful. The questionnaire used in this report (Appendix A) was developed with the hope of shedding light on where these NGOs stand in the transformation process and to identify any difficulties they may be facing.

Working with self-reported data, that at times can be informal, although not always easy to categorize, can reveal some interesting aspects of these NGOs: what they choose to include, and what they choose to omit, for example, can give one an idea about what they view as priorities in their organizations.

1.3 *CT Study Design and Data Collection Methods*

In the fall of 2008, this questionnaire was sent to 25 NGOs (Albania, Argentina, Azerbaijan, Burma, Croatia, Czech Republic, Ecuador, Estonia, Georgia, Kazakhstan, Kyrgyzstan, Kosovo, Latvia, Liberia, Lithuania, Macedonia, Moldova, Mongolia, Montenegro, Russia, Serbia, Slovenia, Tajikistan, Ukraine). This report uses the information collected from these questionnaires as well as some from proposals sent to ESP in response to their Critical Thinking Small Grants Program (Request for Proposals attached, Appendix B).

In examining the data, notes were taken from the questionnaires, color-coded and categorized and any patterns that emerged were noted. Summaries on a per NGO basis made from the notes are included in this report (Appendix C).

1.4 Limitations of the Data

From the group of 25 NGOs that received the questionnaire, only 18 completed a timely response (Albania, Argentina, Azerbaijan, Burma, Croatia, Czech Republic, Georgia, Kazakhstan, Kosovo, Latvia, Liberia, Lithuania, Moldova, Mongolia, Romania, Russia, Tajikistan, and Ukraine.). The seven NGOs (Estonia, Kyrgyzstan, Macedonia, Montenegro, Serbia and Slovenia) that did not complete the questionnaire were not included in this report, which is unfortunate since this group includes some of the more active participants in the CT network. In addition, nine participants (Azerbaijan, Czech Republic, Latvia, Lithuania, Moldova, Romania, Russia and Ukraine) also completed proposals for the Small Grants Program (which provides additional details regarding previous initiatives carried out by these NGOs).

Occasionally, there were problems with the clarity of the writing received from some of the respondents. More in-depth responses could have been ascertained with the ability to follow up with the participants and perhaps receive assistance from native language speakers. It is recommended that further evaluation and research into these programs be conducted with the availability of native language translators for additional clarification purposes.

Many of the questions on the questionnaire are quite open-ended, and the responses do not cite official data. Still, it is in an analysis of what is self-reported, how it is

reported and described and, at times, how it is *not* reported, that is important in obtaining an idea of how these NGOs prioritize and categorize their responses.

In addition, the open-ended nature of the questionnaire, while allowing the network organizations to freely express themselves, underscored the need for CT/ESP to establish formal criteria for evaluating accomplishments. These criteria are the crucial components needed in order to thoroughly analyze the effectiveness of the Critical Thinking Program as well as comprehensively evaluate the success of its integration into national policy.

It is also important to mention that this is a desk-based analysis drawn from written questionnaires and some small grant applications. There was very little chance to verify or ascertain the information in the questionnaires so there may be omissions or misunderstandings of the organizational structure.

1.5 The Structure of Scaling Up

In this document, a number of references shall be made to Uvin and Miller's (1994) excellent work detailing the definitions and taxonomies of the scaling-up process for NGOs. A brief summary of the concepts are illustrated below.

1.5.1 The Categories

There are four broad categories defined in Uvin and Miller's taxonomy and they are the following:

Quantitative Scaling Up

Refers to increasing the reach of a program — in this case, the training of hundreds of additional teachers in CT methodology.

Functional Scaling Up

Refers to diversifying the program reach — in this case, the movement of initiatives from the formal educational sector to areas beyond.

Political Scaling Up

Refers to the ability to address and influence national policy.

Organizational Scaling Up

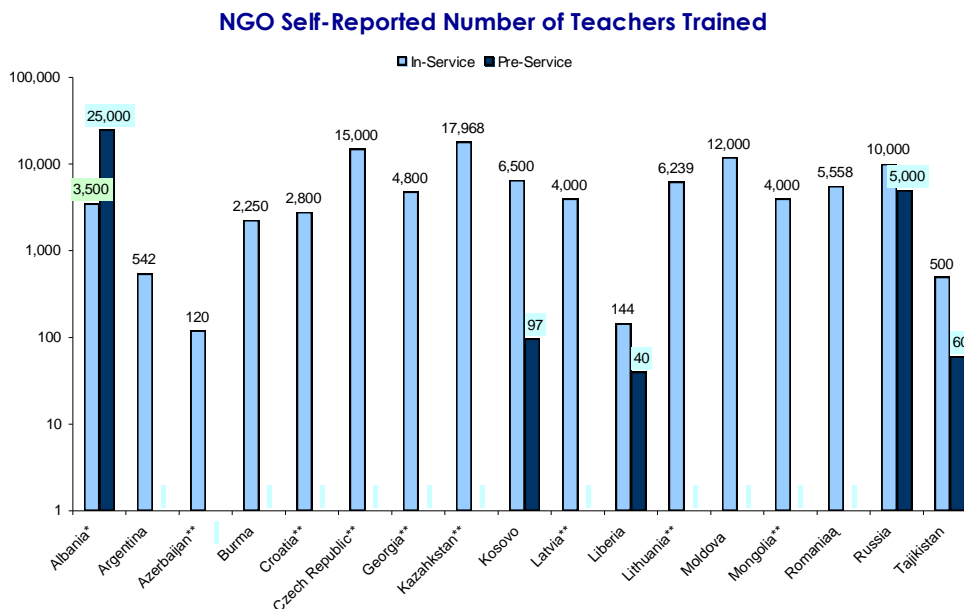
Refers to the ability to support growing initiatives in an organizational manner in order to ensure sustainability. Technical and management capacity is built, and structures and procedures are created.

Successfully scaled-up NGOs experience growth in all the areas mentioned above, however, the changes take place over time and experience certain incremental steps along the way. These changes can happen piece-by-piece or sometimes simultaneously.

2 PRE-SERVICE AND IN-SERVICE TEACHERS TRAINED

Respondents were asked to detail the number of pre- and in-service teachers their organization had trained. Participants' responses were as recorded in the chart below

(Figure 2.1):



- * Pre-service is an estimate as CT methodology has been incorporated into pre-service curriculum
- ** Does not distinguish between pre-service and in-service
- † Does not include state institutions which have incorporated the RWCT methodology into their trainings and services (pre-service and in-service)
- ‡ Does not include pre-service training, which is not tracked but estimated to be in the "thousands"

Figure 2.1

2.1 Pre-service training largely untracked by NGOs

Whereas this graph certainly depicts the quantitative scaling-up performed by the NGOs, it is quickly apparent that there is a little tracking performed of pre-service trainees. It is difficult to get a picture of what kind of pre-service training is taking place from the information presented. Uvin and Miller (1994) maintain that part of successful organizational and political scaling up involves the forging of strong partnerships.

2.2 Conclusion/Recommendation

While it may be difficult for an organization to get an exact amount of trainees, it is important for CT/ESP to establish whether sturdy affiliations are being formed between the NGOs and the universities that are providing training in CT methodology.

These partnerships can help to establish an advocacy base for influencing national policy. In addition, there is a strong need to encourage NGOs to track data regarding pre-service trainees in order to prepare for an evaluation of program effectiveness that will most probably be performed in the future. ESP may want to think about how to develop a generic framework to be supplied to the NGOs in order to begin tracking pre-service training.

3 SELF-REPORTED COUNTRY IMPLEMENTATION PHASES AND OTHER TARGET GROUPS TRAINED

3.1 Program Phase Reported

This section follows the responses given when NGOs were asked to identify the phase their program was currently associated with (based on the descriptions below) and then these answers are compared with those of the next question, where participants were asked to name other target groups that participated in CT training.

3.1.1 Phases as defined in the Questionnaire⁴

First Phase – Initial Phase

This phase of the Critical Thinking Program pertains to the initial training of local educators by CT international experts. These trainees, referred to as first generation participants, are selected by a local team with the assistance of the international experts. First generation participants are typically made up of university faculty members, members of the local Ministry of Education local inspectorates, trainers from in-service teacher training institutes and outstanding classroom teachers.

Second Phase – Dissemination Phase

First generation participants begin training other teachers, known as second-generation participants. These trainees become part of the country's leadership core. An institutionalization strategy is implemented with the support of CT international experts to facilitate dissemination efforts and the institutionalization of the CT strategy.

⁴ Taken from CT Questionnaire attached to this report as Appendix A

Third Phase – Policy/Advocacy vs. Expansion Phase

This phase is broken down into the following two parts (*Figure 3a*):

3(a) – Educational Sector (policy and advocacy)

Training delivery is taking place within the formal educational system including curriculum developers, assessment specialists, in-service teacher training institutes, etc.

3(b) – “Outside” of Formal Educational Sector

Training delivery is done for various target groups outside of the formal educational sector, including, but not limited to: civil workers, managers, journalists, public servants etc., covering issues such human rights, migration, poverty and conflict resolution, among others. These categories listed are not meant to be exhaustive but are provided to the respondents as examples of areas outside of the formal educational sector and based on previous successful applications of CT training.

Phase 3a: Inside Educational Sector (POLICY/ADVOCACY)	Phase 3b: Outside of Formal Educational Sector (EXPANSION)
Training delivery for various target groups including in-service teacher training institutes, others. Areas covered: School curriculum, textbooks, exam/assessment, pre-service/in-service teacher training, ed policy (legislation, regs, standards, instruction), Other	Training delivery is done for various target programs, including but not limited to civil workers, managers, journalists, public servants, etc. Areas covered: Poverty reduction, Teacher leadership, Post conflict resolution/Peace building, Migration, Minorities, Youth, Other

Figure 3.1a

Based on the above, the 18 respondents identified their program phase as follows:

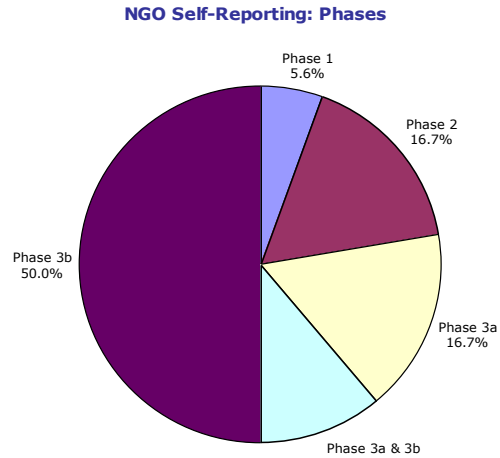


Figure 3.1b

Nine respondents out of 18, or half (*Figure 3.1b*) identified themselves as associated with Phase 3(b), or the *Expansion Phase* (To see the phases listed by country, see *Figure 3.1c*). As is to be expected, NGOs who identified themselves in this phase also cited achievements and articulated future goals later in the questionnaire that applied CT methodology to areas that reach beyond the formal educational sector. NGOs involved projects outside of the formal educational sector are also involved to some degree in the functional scaling up of their program, which Uvin and Miller refer to as “crucial for the sustainability of any organization” By diversifying their focus, these organizations can “increase their degree of self-financing” and strengthen their independence.

Implementation of Phases and Strategies Self-Reported by Country

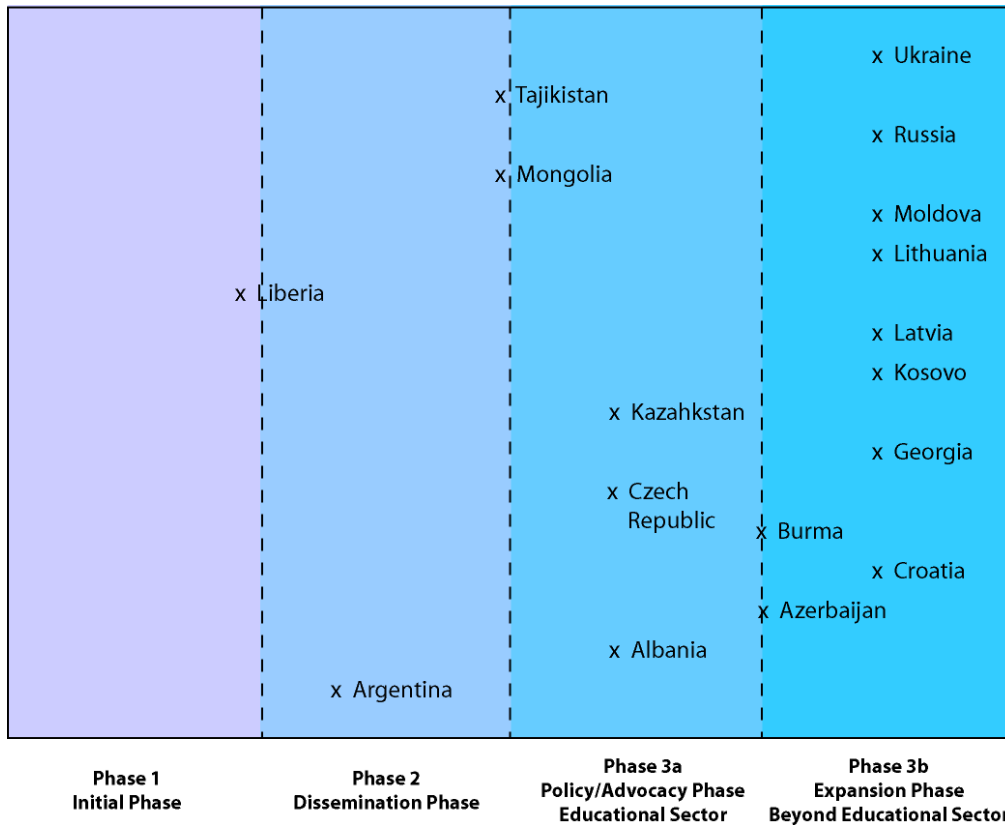


Figure 3.1b

At the same time, there are some countries, such as the *Czech Republic*, identify Phase 3b as “out of their focus” because they feel that there is still much work to continue to be done in the educational sector before they expand their focus. Most NGO’s, however, continue to work simultaneously on areas inside and outside of the formal educational sector.

3.2 *Other Target Groups Trained*

Organizations were also asked to report on other target groups they have trained within and outside of the formal educational sector, the 18 respondents replied as follows. Perhaps the question was not fully understood, because many respondents included teachers/professors in their response.

3.2.1 Target Groups Trained Inside the Formal Educational Sector

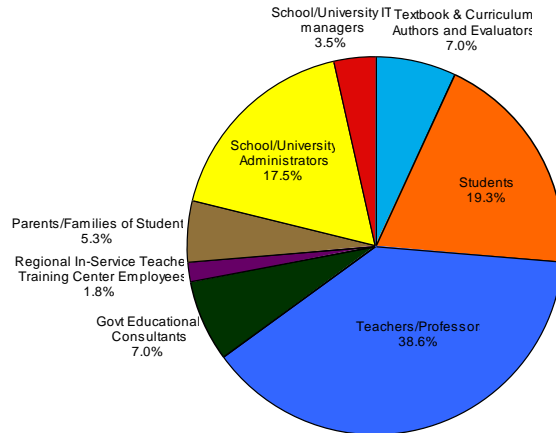


Figure 3.2a

As can be seen above (*Figure 3.2a*), about three quarters of the groups reported by the respondents as other target groups trained within the educational sector were comprised of students, teachers and school administrators. The remaining quarter involved a variety of diverse groups, including families and IT managers, textbook and curriculum authors and evaluators, training center employees and government consultants.

3.2.2 Target Groups Trained Outside the Formal Educational Sector

Other target groups reported as trained from outside the formal education depict diverse areas (*Figure 3.2b*). The largest groups reported were employees from Democratic Change/Civic Participation projects and Librarians.

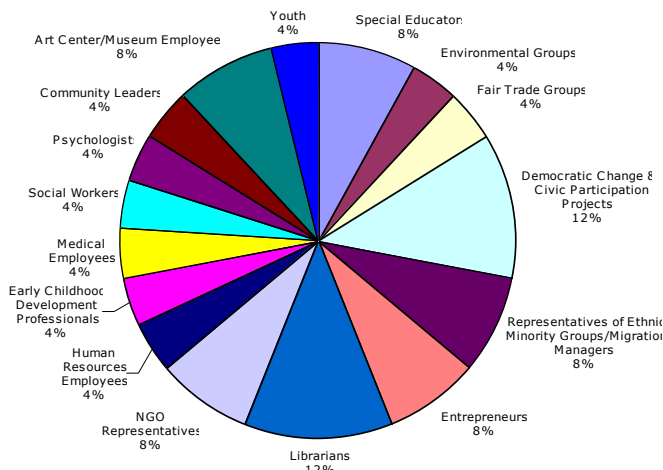


Figure 3.2b

4 THE FORMAL EDUCATIONAL SECTOR: PAST ACHIEVEMENTS AND FUTURE GOALS

The next section of the questionnaire asks for information detailing the integration of CT methodology into the formal educational sector. Respondents are asked to detail achievements and future goals in the following areas: School Curriculum, Textbooks, Examination/Assessment System, Educational Policy (legislation, regulations, standards, instruction, etc.) and Other Achievements. Because the NGOs responding to this questionnaire have national curriculums, this section overlaps policy and much of the achievements reported also have a direct influence on national policy.

4.1 *Achievements in the Area of School Curriculum*

I have divided the responses to this part of the questionnaire into three areas:

General Statements, Specific Examples and Informal Observations (*Figure 4.1*).

General Statements	Specific Examples	Informal Observations
<ul style="list-style-type: none"> • Described CT methodology as dominant methodology of state curriculum or “embedded” in system (<i>Albania, Kazakhstan</i>) • Facilitates adaptation of new curriculum by state officials (<i>Russia</i>) • Provides expert reviews of the state curriculum for school officials (<i>Czech Republic</i>) • Dominant teacher training course offered at all levels of education (elementary through higher ed) (<i>Latvia</i>) • Collaborates with state schools and ministries in curriculum development (<i>Czech Republic</i>) • Developing school curriculum important component of NGO (<i>Georgia</i>) • Participates in the development of school curriculum with other participants (<i>Czech</i>) 	<ul style="list-style-type: none"> • Conducts quantitative surveys to determine number of teachers employing CT methodology in classroom (<i>Czech Republic</i>) • Develops scope and sequence of a particular part of the curriculum (i.e., reading and literacy, health education, etc.) in the state curriculum in conjunction with state institutes (<i>Czech Republic</i>) • Provides evidence of specific examples of CT methodology observed to be part of state curriculum (<i>Kosovo</i>) 	<ul style="list-style-type: none"> • Cites evidence of new/renewed interest in CT methodology • No formal adaptation, but evidence of indirect outcomes based on individual initiative. (<i>Moldova, Mongolia</i>) • Many dominant voices have undergone CT training (<i>Lithuania, Romania</i>)

<i>Republic)</i> <ul style="list-style-type: none"> • CT trainers involved in discussions regarding national curriculum (<i>Mongolia</i>) 		
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Figure 4.1

4.1.1 General Statements

Six of the 18 respondents NGOs described broad adaptation of CT methodology into the national curriculum (Albania, Georgia, Kazakhstan, Latvia, Mongolia and Russia), using mostly general terms. Responses ranged from references to the CT program as the “dominant methodology” and “embedded in the curriculum” (Albania), “officially included in the curriculum standards” (Kazakhstan), “integrated into all state level educational documents” (Latvia), adapted into “new school curricula” (Russia) and an “important component of the project” (Georgia).

4.1.2 Specific Examples

NGOs that provided more information about the types of influence CT methodology had on curricular reform, such as *Kosovo*, cited specific components of the CT program such as “objectives-based planning, Bloom’s taxonomy” and the use of the portfolio as an “assessment instrument” as evidence of the methodology’s adaptation. *Ukraine* and *Romania* referred to elective courses designed for high schools and subject areas where CT methodology was being employed. The *Czech Republic* wrote about how their agency had provided “expert reviews of the state school curriculum,” helped school coordinators in the elementary and middle grades to implement new state curriculum, and designed and developed “the reading literacy subject area of the national curriculum” in conjunction with state institutes.

4.1.3 Informal Observations

Nearly all of the NGOs mentioned their respective state agency's positive reception to CT methodology, and many referred to CT training's strong influence on its participants. *Moldova* noted that they had observed an "informal adaptation" of CT methodology as "indirect outcomes" that influenced school curriculum and were brought about on the "individual initiative" of instructors who had undergone CT training. *Mongolia* asserted that many of their participants in CT training were currently involved in "various curriculum development activities." And finally, *Lithuania* reported that many of their CT-trained participants were also heavily involved in the development of curriculum and textbooks.

And finally, nearly all who responded to this part of the questionnaire commented about the positive response to CT methodology shown by many teachers. They also seemed to recognize the value that arose out of having their teachers as an advocacy tool.

4.1.4 Additional Questions and Concerns Raised Regarding Involvement in School Curriculum – Tracking Practice and Continuous Professional Development

Three respondents within the above group (Croatia, Kazakhstan and Latvia) alluded to later stage concerns regarding the adaptation of CT methodology into official national policy. *Croatia*, presenting survey data that asserted that 91% of CT-trained teachers are "mostly implementing all [CT] techniques," also added that many CT-based seminars were being delivered by "state agencies" without attribution to their organization ("without mentioning where it is from"). Whereas to a large extent, an organic adoption of the teaching methodology is a desired outcome, it appears that these NGOs see the lack of attribution as something that detracts from CT's intention to "conceptualize the program for the use in a wider range of contexts" (Critical Thinking Program Strategy 2009 –2010), as the success of this objective could depend on the

recognition of the NGO as well as the CT methodology as a significant player in educational reform and beyond.

Kazakhstan and *Latvia*, on the other hand, expressed concern that while CT methodology has been officially adapted into national school curriculum, they were not sure of the extent of its implementation (“The question is whether it is a part of everyday school life.” [Kazakhstan]; “...implementation in the teaching practice is not so smooth” [Latvia]). Each NGO later recommended post-training continuous professional development and careful follow-up as a way to inform their trainees about current best practices and perform an “authentic assessment” of their teaching methods.

In fact, not only did *Kazakhstan* and *Latvia* recommend ways to extend professional development and keep their trainees’ learning fresh, *Romania*, *Czech Republic* and *Moldova* did the same when discussing their future goals in the formal educational sector. Some NGOs proposed requiring their trainees to attend annual meetings and write publications (Latvia), *Romania* suggested requiring trainees to implement a one-year action research project as a component of their training, long-term staff development and mentoring (Moldova) and the *Czech Republic* proposed the increased distribution of their publication, *Kriticke listy* (Czech Republic). All suggestions address a real need for NGOs to help create a strong and informed advocacy base of practitioners as a means of influencing local educational policy

4.1.5 Future Goals – School Curriculum

Aside from the training follow-up goals mentioned above, future goals concerning curriculum included the development of curriculum for primary schools (Azerbaijan, Latvia, Moldova and Ukraine), secondary schools (Azerbaijan, Lithuania) and higher

education (Lithuania) and support for curriculum development using CT methodology (Burma, Georgia and Russia).

4.1.6 Recommendations: School Curriculum

A great deal of respondents reported that their CT training programs had a significant influence on the national curriculum and that CT methodology was a prominent feature of educational reform. These reports are encouraging as they demonstrate that these NGOs have the ability to integrate themselves into educational administration and agencies at the top.

For those NGOs who have not initiated work within the policy-making sector, the positive reception that the CT approach is reported to enjoy should encourage them to take the next steps. As Uvin and Miller (1994) point out, “political scaling up is not limited to attempts to influence national governments, but also regional or local government structures.” It may well be that these NGOs are actually building a strong political powerbase by achieving excellent reputations and thus need only a small amount of guidance from CT/ESP in order to be able to advance their goals in the political process. It is important to establish how the individual NGOs view their relationships with policy makers in order to determine what advisement is needed.

Most apparent in this information is a need for the standardization of different terminologies to describe achievements within the network. As of now, there are no formal criteria established to evaluate the success of integration into any of the areas mentioned above. Are there benchmarks of achievement in this area that CT/ESP hopes these NGOs will reach?

4.2 Textbooks

4.2.1 Strong Link between CT Participants/Trainers and Textbook Authorship/Development

Fifteen of the 18 respondents provided examples of achievements in the area of school textbooks (Albania, Azerbaijan, Burma, Croatia, Czech Republic, Georgia, Kazakhstan, Kosovo, Latvia, Lithuania, Moldova, Mongolia, Romania, Russia and Ukraine). Eleven of these respondents reported that many CT trainers and participants were authors and/or developers of textbook materials.

4.2.2 Further Developments

Azerbaijan revealed strong links with national education reform when they reported that three of their certified CT trainers had been “appointed by the Ministry of Education as textbook evaluators and development trainers.” The *Czech Republic* not only cited school textbooks that they had developed, but also compendiums of CT methodology lesson plans. In addition, they mentioned that they had educated their trainees “how to identify and choose textbooks corresponding to the CT constructivist pedagogy.” *Russia* referred to itself as a source of “scaffolding and scholarly support” for “the new generation of textbooks.”

4.3.3. Future Goals: Textbooks

Respondents’ goals in this area varied from publishing new training materials and making older materials available in native languages (Azerbaijan, Croatia, Latvia and Liberia) to advising on textbook selection and providing support to textbook authors and publishers (Burma, Czech Republic and Russia). *Georgia* and *Lithuania* planned to extend support for authors of textbooks designated for new national curriculums and to participate in discussions with them. Some respondents disclosed their intentions to

develop textbooks in specific target areas such as Liberian literature (Liberia), History, Law and Sustainable Development (Ukraine).

4.3.4 Conclusion/Recommendation

After 2009, the *Reading and Writing for Critical Thinking* program became the *Critical Thinking* program in order to dispel “the perception that interventions are limited to reading and writing strategies across the educational sector⁵.” Still, despite of these efforts to expand perception, most of the textbook publications mentioned by the network organizations in this section are in the Humanities – more specifically, literature and foreign languages.

It may be that CT/ESP needs to provide guidance on developing content in other areas of curriculum. There would certainly be a benefit derived from exploring and analyzing some of the successful textbooks from outside of the typical areas that have been mentioned by the NGOs (for example, Law [Ukraine] and Natural Sciences [Latvia]).

4.4 Examination/Assessment System

4.4.1 A Zone of Discomfort?

Could the lack of response from nearly half of the respondents (Albania, Argentina, Azerbaijan, Croatia, Kazakhstan, Mongolia, Tajikistan and Ukraine) in this area indicate discomfort with Examination/Assessment reform using CT methodology? In addition, of the remaining ten respondents who detailed achievements within the examination/assessment area, only five of them provided responses that gave demonstrable examples of techniques employed (Bloom’s taxonomy, portfolio assessment, formative assessment, etc.) (Albania, Croatia, Kosovo and Romania).

⁵ Critical Thinking Program: Strategy 2009-2010

4.4.2 Future Goals

Future goals in assessment ranged from broad (“continue to develop recommendations on qualitative assessments” [Russia], “inform individuals from inside and outside the formal educational sector about assessment” [Czech Republic]) to specific (“support credit system and portfolio assessment” [Kazakhstan]). This area was also the source of a demonstration of the confusion about formative assessment as seen by *Liberia’s* comment discussed below.

Liberia’s assessment goal is stated as follows:

...to have access to examination results so as to measure RWCT impact and produce a monitoring tool

which misses the mark on assessment in terms of CT methodology. Examination results from a national test do not reflect changes in assessment techniques and CT’s methodology relies more on authentic forms of assessment than national exams.

4.4.3 Conclusions/Recommendations

Latvia’s Education Development Center writes the following about assessment, which they perceive to be a shortcoming in the implementation of CT methodology:

... [T]he uncertainty concerning what criteria to use and how to assess students’ creative work creates problems for teachers. The experts emphasize that teachers often lack the assessment skills, namely, the skills to determine criteria according to which to assess the students’ performance...[T]he use of CT methodology in school practice brings along also the necessity to give up the final examinations in the assessment system as the main and often the only measure or criterion in assessing the student’s knowledge and skills.

Naturally, trying to use the CT approach, but relying on summative/quantitative forms of assessment such as final exams to evaluate student progress, or confirm passing or failing a course, is conflicting and confusing at best. CT methodology, in order to be successful and sustainable, needs to be applied across the curriculum from teaching to

assessment. When pre-service and in-service training is securely in place, benchmarks are established and reached and outstanding curriculum and textbooks have been developed to deliver CT methodology, then coming to terms with formative assessment should be easier. Systemic changes are required for the smooth implementation of all aspects of the CT approach.

Still, it may be necessary to provide support to these NGOs that continue to struggle in this area of diversifying. Additional training may be required.

4.5 Pre- & In-Service Teacher Training

More than half of the respondents in this area clearly indicated that courses on the subject of CT methodology were being taught at pre-service pedagogical institutions (Albania, Azerbaijan, Croatia, Czech Republic, Georgia, Latvia, Lithuania, Moldova and Romania), but only one of the respondents indicate that the designated course was a “requirement for accreditation” (Albania). Therefore, although courses are being offered to pre-service teachers, it remains for ESP/CT to determine whether they are required courses, or being offered on an elective basis. Still, taking into consideration the “high demand” (Romania) that is often referred to with regard to courses in CT methodology, and the fact that in many countries university professors have received some training, it can be assumed that these courses enjoy a fairly high profile at some of the universities.

In-service teacher training is very prevalent, and aside from being “well-known and recognized,” (Albania) is officially incorporated into the system in some of the respondents’ respective countries (Croatia, Georgia, Lithuania and Russia).

4.5.1 Future Goals Pre-Service & In-Service Teacher Training

Over half of the questionnaire respondents listed teacher training as an area of focus in their goals and objectives for the next one to two years. Most goals concerned

development of new training materials (Argentina and Tajikistan), making training available in other areas of their individual countries (Croatia, Georgia, Liberia and Tajikistan), and being incorporated into national pre-service curriculum (Kosovo, Mongolia and Russia). In addition, many NGOs expressed a desire to introduce CT methodology into the classroom as early as primary school. This is especially evident in the proposals for the Small Grants Program.

4.5.2 Pre-Service & In-Service Training – Conclusion/Recommendations

Although many NGOs have been providing training to teachers for quite some time now, there are some aspects of training that have not been completely accomplished. Many NGOs mention the need to reach some of their more remote areas both in terms of in-service and pre-service training. Some suggest using information technology for this purpose. In addition, there are calls for new types of training courses to be developed.

Types of pre-service classes and enrollment should be closely monitored. There were some instances where there was confusion as to whether classes being referred to were *using* CT techniques and teaching methods such as “think alouds” and “graphic organizers,” or whether they were actually teaching *about* CT methodology. Collecting more data on pre-service courses should be another method used to strengthen the connections between NGOs and universities.

4.6 *Other Achievements*

The most prevalent achievement listed in this area of the questionnaire listed published material such as teaching support materials (Czech Republic, Kazakhstan and Kosovo) and quarterly journals (Czech Republic and Kazakhstan). The *Czech Republic* also cited their interactions with media through their participation in TV and radio programs and *Latvia* and *Mongolia* noted the development of new teacher training courses.

4.7 *Conclusion/Recommendations – Formal Educational Sector*

- Speak more in-depth with NGOs to ascertain how they view their role in school curriculum reform and to figure out where they stand on the continuum between establishing political relationships and influencing national policy
- Establish benchmarks that will enable criteria for formal evaluation.
- Examine textbooks that use CT methodology and have been successful in areas beyond humanities
- Provide additional training and support regarding assessment techniques and examination reform
- Track pre-service training more carefully in order to determine the approximate numbers of and types of courses that are being offered.

5 ACHIEVEMENTS AND INSTITUTIONAL ROLE IN NATIONAL EDUCATIONAL REFORM/POLICY

5.1 Educational Policy –Levels of Involvement

In the questionnaire pertaining to Section 4 above, *The Formal Educational Sector: Past Accomplishments and Future Goals*, there was an area that asked about achievements in educational policy. Responses were combined from that area with the responses to question 5, which asks about the organization’s role in national education reform. Similar to section 4.1, *Achievements in the Area of School Curriculum*, there is a need to create standards and definitions of achievements in policy in order to accurately evaluate and describe them. This need can be seen in *Figure 5.1* below:

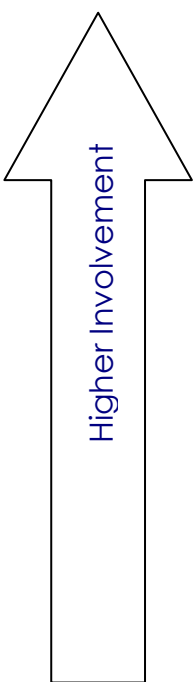
	<ul style="list-style-type: none"> • <i>Evaluates</i> State Educational Policy effectiveness (Czech Republic, Russia)
	<ul style="list-style-type: none"> • <i>Active in all areas of policy on national and sub-regional level</i> (Russia)
	<ul style="list-style-type: none"> • <i>Provides expert voice</i> on equal access to education, diversity, quality assurance of education (Romania)
	<ul style="list-style-type: none"> • <i>Shares role as member of expert team to design/develop</i> teaching standards [general and specific course-related] (Czech Republic, Georgia) school curriculum (Czech Republic, Georgia, Lithuania), accreditation (Georgia), teacher quality assurance (Georgia, Romania), professional development (Georgia), pre-service training (Lithuania), professional licensing requirements (Kosovo), school improvement (Azerbaijan, Georgia), school leadership (Azerbaijan), inclusive education (Azerbaijan)
	<ul style="list-style-type: none"> • <i>Active in public policy discussions and debates</i> regarding educational policy and/or legislation (Albania, Croatia and Ukraine)
	<ul style="list-style-type: none"> • <i>Plays advisory role</i> in educational departments (Burma)
	<ul style="list-style-type: none"> • <i>Cooperates directly</i> with MOE providing training for required areas (Kazakhstan)

Figure 5.1

Figure 5.1 consists of an attempt to organize information in by degree of level of involvement based exclusively on the information self-reported by the NGOs. It should be apparent, that is not possible to tell whether this information correctly reflects the actual level of policy involvement experienced by individual NGOs. In fact, without

criteria to evaluate the success/level of policy involvement, it is difficult to obtain an accurate picture of the information.

5.2 *Conclusion/Recommendations*

ESP/CT can rely on intimate knowledge of the NGOs to help them answer some of these questions above and to decide how much they need to intervene in this area.

There is an urgent need for closer examination of the effects of member networks upon local educational policy, as well as the establishment of criteria to be examined.

Another question that remains to be answered involves organizational scaling up. Are leadership and management at these NGOs strong enough to implement communication effectively in order to make an impact in national policy? Are they strong enough to establish the partnerships that need to be made in order to put policy into place?

6 UNDERSTANDING OF THE PRIORITIES OF THE OSI NATIONAL FOUNDATIONS IN RESPECTIVE COUNTRIES

It has been a strategic priority of CT/ESP to establish stronger links between national foundations and NGOs. National institutions can provide expertise in capacity building and sustainability of program

In the questionnaire, participants were asked to state “the priorities of the OSI national foundation in education in [their] country, if applicable.” (See question 7, Appendix A) The following table below lists their responses and indicates when the question is not applicable. It is hoped that ESP/CT can use their existing knowledge of the participants along with their self-reported information (or the lack of it, in some cases) to shed some underlying perspective on the relationship between the foundations and the NGOs.

Five of the 18 NGO respondents do not have national foundations in their countries/regions (Argentina, Burma, Croatia, Lithuania and Russia).

Five NGOs cited a lack of specific institutional relationships between themselves and their national/regional foundations, or claimed that they do not share priorities. Georgia's *School-Family-Society Association* claimed that the *Open Society Georgia Foundation* has not implemented any educational projects "in recent years." Similarly, *Romania* stated that the "national OSI foundation does not deal in education." *Kriticke mysleni* of the Czech Republic claimed to have "no institutional relation to OSF Prague" and added that it does "not participate in goal setting or any other agenda of the OSF Prague." *Kosovo* wrote that it was their understanding that its national foundation only considered "RAE⁶ education" to be a priority. *Moldova* wrote that the "national OSI office does not have an educational component."

There were four remaining NGOs that clearly list their national foundation's priorities (Azerbaijan, Latvia, Liberia and Ukraine). Of the four, only one, in *Azerbaijan* appeared to share a focus with their national foundation when they cited "education NGO capacity-strengthening" as one of its priorities.

Finally, four respondents (Albania, Kazakhstan, Mongolia⁷ and Tajikistan) left this response blank on their questionnaires, although they are known to have national foundations.

⁶ Roma, Ashkali and Egyptian minorities in Kosovo.

⁷ In the case of Mongolia, this might be explained by the fact that they were not originally affiliated with the existing foundation in their country, but are a spin-off of a foundation that recently closed.

6.1 *Conclusion*

It appears that if ESP/CT would like to strengthen relationships and support between NGOs and their national/regional foundations, many of the responses to this question received from the NGOs should be carefully considered. Are the NGOs that claim their foundations share no educational focus looking at all the information? Are the NGOs who left this question blank even though they do have national foundations purposefully choosing not to acknowledge them? These questions should be closely examined.

7. PROJECTS ACHIEVED OUTSIDE THE FORMAL EDUCATIONAL SECTOR:

7.1 *Overview*

Many projects were listed outside the formal educational sector. In the following section I have attempted to illustrate sub categories within this area when possible.

7.2 *Teacher Leadership*

Twelve NGOs referred to work in Teacher Leadership (Argentina, Azerbaijan, Burma, Czech Republic, Georgia, Kazakhstan, Kosovo, Lithuania, Mongolia, Romania, Tajikistan and Ukraine). Teacher Leadership appears to be interpreted broadly, however, and upon examination can be broken down into different subcategories, including Anti-Corruption, Mentoring, International Exchange, Management, University Leadership, Curriculum and Assessment⁸.

7.3 *Youth*

Another logical outgrowth from the formal educational sector, the next area with the most projects reported is Youth (Burma, Croatia, Georgia, Liberia, Lithuania, Moldova, Romania, Tajikistan and Ukraine). Many areas such as transparency, civic

⁸ See Appendix C, for short descriptions of the types of projects reported in this section.

education, community-outreach, economic/vocational training and leadership, all tailored specifically for young people, are included in this area.

7.4 *Other Areas*

Minority Rights, Children's and Human Rights, services and schools for Internally Displaced Persons, multicultural and intercultural dialogue (with a strong focus on the Roma people), advocacy and education for students with special needs, mediation, and crime prevention are some of the other areas that appear more than once among projects outside of the formal educational sector. *Azerbaijan, Burma, Croatia, Latvia, Kosovo, Lithuania, Georgia, Kazakhstan, Moldova* and *Ukraine* reported some work in this area.

7.5 *Active Respondents*

Azerbaijan, Burma, Croatia, Kosovo, Latvia, Lithuania, Romania, and Ukraine detailed a wide variety of projects that place them firmly in Phase 3b in their country implementation and strategies. Of course, the *Czech Republic, Latvia, Lithuania* and *Romania* have access to more opportunities available to them as a result of being part of the European Union; *Burma* also has its share of private funding.

7.6 *Less Active Respondents*

As is to be expected, some NGOs who have not been in operation as long, reported little work outside the formal educational sector (*Argentina, Liberia, Moldova* and *Tajikistan*).

Some organizations are more inclined to stick within CT's original focus and have not implemented the methodology very much throughout other areas (*Czech Republic* and *Russia*).

7.7 Conclusion

Teacher leadership and Youth programs are all natural outgrowths of work within the formal educational sector. However, in order to meet the goals of the ESP and Critical Thinking Program, many NGOs will need to functionally scale up, and implement more programs above and beyond these. Additional capacity building and support with this endeavor may be needed. In addition, clarification and further education regarding the types of opportunities that lend themselves to CT methodology should also be evaluated from past successful implementations.

8. FUTURE GOALS OUTSIDE FORMAL EDUCATIONAL SECTOR

8.1 Overview

Areas of future concentration are outlined below.

8.1.1 Information Technology Capacity Building Tool

One possible area of future goals that is strongly suggested from the data involves the use of information technology. Some participants are planning to implement distance-learning modules for their CT training (Argentina and Croatia). Other respondents speak of strengthening their national and international networks (Czech Republic, Moldova and Russia), something that could possibly be accomplished through the development of member-only message boards or list-serves (depending on internet availability in the area, of course). The *Czech Republic* experienced success publishing an “international almanac,” or compendium, of CT lesson plans; something similar could be collected on line as well. *Georgia* also lists a goal of “[r]aising [the] level of informational literacy and effective use of informational technologies in schools.”

CT has also seen a need to explore this area. In the 2009-2010 Strategy they express the need to place less emphasis on developing their content with a “text-based

methodology” and more openness to “interactive strategies.” Perhaps CT’s own successes with implementing these interactive strategies can be passed down to its trainees for use in their own classrooms.

8.1.2 Publishing and Media/Increasing Awareness of CT

Tying in with the need for information technology support, *Liberia* and *Tajikistan* plan to be working on their organizations’ web sites, which is really just an electronic form of media publication. *Georgia* lists one of its goals as renewing the publishing of their educational journal *Tsignieri*. The *Czech Republic* mentions publishing their journal *Kriticke listy*, distributing it to more schools and making its “profile more respected by giving [its] peer-review system more academic prestige.” Each NGO hopes to create more awareness of CT methodology by making these journals available. The Czech Republic also has listed past participation in television and radio programs as another method of making CT methodology better known. Perhaps this is something that can be encouraged in other NGOs as well.

As has been discussed before, this is part of political scaling up via the path of information and mobilization, and is essential to gathering support.

8.1.3 Museums

Museums have always been well suited to concepts of active learning and therefore it is not surprising that *Azerbaijan*, *Moldova* and *Ukraine* make mention of museum projects in which they plan to incorporate CT methodology. Perhaps this is also an area outside the formal educational sector that can be explored by other members of the CT network.

8.1.4 Continuous Professional Development

As has been mentioned, many NGOs mentioned the need for more rigorous standards of training, evaluation and monitoring of professional development and implementation of CT methodology in the classroom. This can be viewed as a part of organizational scaling up since quality of trainees is being focused on.

9. RECOMMENDATIONS

This section shall serve as an overview of many of the recommendations that have been made throughout this analysis of self-reported data.

Tracking pre-service trainees

Many NGOs do not appear to track the number of pre-service trainees in CT methodology. By keeping closer contact with these trainees, NGOs could, among other things, increase their affiliations and membership base, allowing them greater voice in influencing educational policy. In addition, the tracking of these trainees would contribute greatly to any future analysis of the effectiveness of program.

Providing support: Distance Learning (Information Technology)

In one sense, expanding geographic reach is a way of expanding a membership base and building community. Many NGOs mentioned their desire to reach instructors in remote areas through distance learning, ESP/CT should examine ways that they can support this effort.

Providing support: Online professional networks (Information Technology)

In addition to providing distance learning options for new trainees, creating bulletin boards and online communication networks where CT-trained teachers from different regional communities are able to share ideas is also an area that deserves further exploration. In the long term, online communities can create stronger affiliations and increase the spread of the program's methodology, thereby strengthening NGOs' ability to address and influence national policy down the road. Assistance with using information technology to develop on-line communities for national and international networking can greatly contribute to this effort.

Support for extended professional development and follow-up

Extended follow-up with trainees/trainers in the form of professional development/participation from trainees who express interest with action research projects, journal publications, etc. This could help facilitate any eventual assessment of the effectiveness of program, in addition to building a strong base of supporters.

Develop programs and address parents/caregivers and the community at large

The local communities and the families and caregivers of populations who are benefiting from CT methodology are a key group for which targeting education and support is crucial and should not be overlooked. The mobilization of community members could serve to influence state policy makers in the future.

Support in using media to generate publicity

NGOs could benefit by learning about the use of television, radio and the publication of professional journals to help make them recognized beyond the local community and on a larger scale.

Support in matters of policy

Descriptions and degrees of policy achievements varied widely from one organization to another, suggesting that organizations could use support in formulating policy, recruiting policy stakeholders and setting up successful partnerships to effect policy changes.

Analyze sources of local support

Give careful consideration to partnership between national/regional foundations and NGOs, both historically and in terms of future possibilities. These foundations have the potential to be a source of enormous support.

Additional clarification and support regarding assessment techniques

Since lack of response and some confusion of terms were noted among participants regarding assessment techniques, additional training on CT/formative assessment techniques is suggested to those NGOs who demonstrate need.

Inquiry and sharing of the creation of successful textbooks

Provide assistance in targeting subject areas for textbook creation that extend beyond the traditional areas of the humanities that are most common for CT methodology (literature, languages). NGOs will benefit from extending their reach in the curricula. Successful projects should be closely examined and, if possible, shared between the network

Inquiry and sharing of the implementation of successful projects outside the formal educational sector

Similarly, NGOs have demonstrated some diversity of ideas in their future plans outside of the formal educational sector, some of which could greatly increase their functional scale and in so doing increase their sustainability. Assistance in the form of training/support with the possibilities of projects outside of formal educational sector to should be shown to those NGOs who demonstrate need. Also, developing ideas on how to share successful projects across the network should be explored.

Developing formal criteria for program evaluation

It is very difficult to evaluate the effectiveness of a program, or its impact, without the establishment of some types of formal criteria. CT/ESP should consider establishing reasonable benchmarks that can be used by NGOs as a means of describing achievements inside and outside the formal educational sector, and in national policy.

Organizational Scaling Up

Finally, CT/ESP needs to consider all aspects of NGOs, including organizational ones. This is part of “assuring that when an organization grows, it is able to sustain its programs without complete dependence on upon non-renewable resources (financial, technical, physical)...In short, the objective of organizational scaling up is financial and managerial autonomy” (Uvin and Miller, 1994). CT/ESP need to take a close look at these NGOs in order to ascertain whether they have the organizational strength needed to navigate and influence policy, and to work closely with officials from state institutions.

10. REFERENCES

Critical Thinking Program: Strategy 2009-2010

Educational Support Program: Strategy 2010-2011

How students learn: a statement of first principles.

Uvin, P., & Miller, D. (1994). Scaling up: thinking through the issues. Proceedings of the The World Hunger Program, <http://www.globalpolicy.org/component/content/article/177/31630.html>

APPENDIX A: BLANK QUESTIONNAIRE

Reading and Writing for Critical Thinking(RWCT) / currently Critical Thinking(CT) Program Questionnaire

Name of organization

Name and positions of the main contact person

Address of organization

Contact tel. number

E-mail address

Website

Skype address _____

1. Please review a general description of program development phases below and identify the phase your program is currently associated with. Provide any additional information that might help to describe specifics of your national program.

Country implementation phases and strategies:

First Phase. Initial phase

The Critical Thinking Program of OSI delegates CT international experts to a particular country joining the CT program. CT international experts join the efforts of the in-country team in the design of the program, selecting criteria for participants, management aspects, multi-stakeholder communication, program promotion strategy, others. Participants for the Critical Thinking project are selected by the in-country team and coordinators; typically part of the group of participants become university faculty, members of the Ministry of Education local inspectorates, trainers from in-service teacher training institutes, and outstanding classroom teachers.

CT is based on a "train-the trainer" model. CT Experts offer a series of five workshops over a 12-18 month period. During this time participants practice the methods demonstrated, adapt them to their own classrooms, and substitute national texts for those introduced in training workshops. They also meet on a monthly basis with colleagues to discuss their progress, and are observed by peers and CT experts in the classroom. Local educators' knowledge is critical to the overall success of the project. CT is designed to invite modifications that resonate within each country.

Second Phase. Dissemination phase

At this stage, the first generation participants begin to train other teachers. The second generation participants become part of the country's leadership core. Trainers are ready to deliver training for teachers and university teachers. In order to increase the efficiency of the dissemination efforts and to ensure institutionalization of the Critical Thinking Program, an institutionalization strategy

is elaborated within each country. Critical Thinking experts work to support the in-country team in the development of this particular strategy.

Third Phase. Policy/ Advocacy vs. Expansion phase.

This stage is characterized by the development of the Critical Thinking program into two main directions:

- a) **Educational Sector (policy and advocacy):** training delivery for various target groups within the educational system including curriculum developers, assessment specialists, in-service teacher training institutes, others. The areas covered on this stage include all educational system components (assessment, curriculum, textbooks, standards, management, etc.);
- b) **“Outside” of Formal Education Sector (expansion):** at this stage training delivery is done for various target groups including but not limited to civil workers, managers, journalists, public servants, etc. The areas covered here include such issues as migration, human rights, civic rights, HIV/AIDS, community development, leadership skills, participative decision making, etc.

2. How many pre -service and in-service teachers trained during the whole duration of the project?

3. List other target groups (from within and outside educational system) that participated in RWCT trainings or trainings where RWCT strategies were applied?

4. What are the RWCT achievements in your country in terms of integration of the RWCT/CT methodology and philosophy into:

- School curriculum:

- School textbooks:

- Examination / Assessment system

- Pre-service and in-service teacher training programs:

- Educational policies (legislation, regulations, standards, instructions, etc)

- Other achievements (please specify)

5. What is the institutional role of your organization in national education reforms?

6. Please provide a brief summary of projects implemented by your organization (if any) on the following topics:

Poverty/poverty reductions

Teachers' leadership

Post conflict resolution/peace building

Migration

Minorities

Youth

Please provide the following details: Name of the project & donor organization, duration, target groups, goals & objectives, types of activities, achieved deliverables

7. What are priorities of the OSI national foundation in education in your country if applicable. Please contact your local OSI office to obtain details on this question.

8. What are your goals and objectives for the next 1-2 years on integration of the RWCT/CT methodology into:

- School curriculum

- School textbooks

- Examination / Assessment system

- Pre-service teacher training

- In-service teacher training:

- Educational policies (legislation, regulations, standards, instructions, etc)

- Others (please specify):

9. What are your RWCT/ CT Program objectives/targets for the next 1-2 years outside of what mentioned above.

APPENDIX B REQUEST FOR PROPOSALS, SMALL GRANTS INITIATIVE

CRITICAL THINKING PROGRAM, EDUCATION SUPPORT PROGRAM

OPEN SOCIETY INSTITUTE, NEW YORK

Critical Thinking Small Grants Program (CT SGP)

GENERAL OVERVIEW

The Critical Thinking Small Grants Program was initiated as a flexible mechanism to enable the Critical Thinking Community of Practitioners around the world to request support for the development of innovative approaches to educational reforms through integration of the principles of Critical Thinking philosophy and principles into national curriculum, textbooks, teachers training, assessment and examination, etc. Through the Policy Engagement initiatives CTP seeks to build upon the existing network of Critical Thinking organizations globally.

Grants will be awarded to non-governmental and non-profit organizations (NGOs). To be eligible for consideration every applicant must be engaged in, or intend to carry out, a research and events with a purpose of further integration of the Critical Thinking methodology and practices in various sectors of educational reforms.

Grants will be awarded on a competitive basis. Decisions will be based on the eligibility and quality of the grant application. Once approved by the Critical Thinking Review Committee, applications will undergo a technical review to ensure compliance with program requirements, allowable expenses, and the accuracy of budgets.

MAIN REQUIREMENTS

Eligibility of Applicants: Who May apply?

Applications must come from registered non-governmental and non-commercial organizations. Projects can only be submitted by *organizations*, not by individuals. Government agencies, businesses, and commercial institutions are not eligible. Applicants will be required to present findings of the research on the CT Practitioners website and events organized by the program.

Theme:

Critical Thinking Small Grants Program welcomes the Critical Thinking organizations around the world to apply for the support from the Critical Thinking Network Program of the Open Society Institute to carry out *policy relevant research and events* that will enable the institutionalization/integration of CT on the educational policy level.

The Small Grants Program will support any of the following activities:

- Policy relevant research;
- Advocacy activities build around research findings and recommendations.

Applicants must exhibit clear policy outcomes and realistic policy implications delivered through this initiative.

Critical Thinking Small Grants Program CANNOT fund:

- Humanitarian assistance or charitable activities
- Political or partisan activities
- Projects aimed at primary institutional development of the organization
- Activities that have no connections with the priorities listed above

Critical Thinking Small Grants Program welcomes projects from all over the world, without any geographic priorities or limitations.

Eligible time period: The time frame for the project should not exceed six months.

Eligible size of grants: The maximum grant is \$10,000, however some awards are smaller.

Eligible costs:

Only costs necessary for carrying out the project will be considered for funding. Salaries, administrative expenses, and purchase of equipment should be linked to specific project activities, and the need for these items for the project should be justified.

SUBMISSION OF PROJECTS

Applicants must complete the standard application form and budget template in English (see attached). Applicants must submit the following mandatory items:

- Completed electronic version of the application form and budget in excel spread sheet (e-mail);
- Certificate of Registration;
- List of founders and Board Members;
- CV of the Executive Director;
- Evidence of the organization's previous activity (annual reports, websites, publications, etc.) that demonstrate best practices and experience in implementing policy related initiatives.

Electronic version of the application should be e-mailed to the following e-mail addresses:

To: Svetlana Batrak, Program Officer sbatrak@sorosny.org, CC: Jonathon Fairhead, Program Assistant jfairhead@sorosny.org
Subject: **CTSGP APPLICATION**

DEADLINES

*Application submission deadline is **October 30th, 2009.***

The complete grant process (from the time a project proposal is submitted to the time the funds are available for use) takes approximately one month.

SELECTION PROCESS

Project selection is competitive. Proposals are reviewed by members of the CT Program Review Committee and decisions are made in collaboration with the Program Officer.

REPORTING

Upon completion of the project, a written financial and narrative report must be sent to the CT Program Officer by the deadline indicated in the agreement.

NOTIFICATION OF APPLICANTS

Award notifications will be sent by November 7th, 2009

Project proposal receipt: The applicant will receive an e-mail notification when the project proposal is received. We discourage the applicants from calling and checking if the application was received.

Results: The results will be communicated electronically once the application is reviewed.

APPENDIX C: SPREADSHEET/NOTES FROM QUESTIONNAIRES AND PROPOSALS