

## TECHNICAL NOTE

# Generating Education Resources during the COVID-19 Pandemic: Analysis and Recommendations

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August 2020

## Introduction

Education institutions are rushing to explore new ways in ensuring the continuity of learning and preparing for the opening of classes while safeguarding the health and safety of its learners and personnel during this pandemic. With physical distancing and community quarantines established by the Department of Health (DOH) and the Inter-Agency Task Force for the Management of Emerging Infectious Diseases (IATF) as useful measures to contain the spread of COVID-19, physical face-to-face classes in schools are suspended.

Given this, the Department of Education (DepEd) issued the Basic Education Learning Continuity Plan (BE-LCP) which identifies alternative education interventions and possible learning modalities (including eventual return to face-to-face classes) to help schools and field offices operationalize their own respective plans.

However, great challenges seem to be affecting this initiative as the shift to an alternative education delivery during a health emergency is something new to this generation. Access to information and communication technologies (ICTs) and availability of learning resources have become extremely crucial for both learners and teachers. Furthermore, operations that necessitate physical presence in offices and schools require careful compliance to health standards including availability of medical or safety equipment and disinfection protocols.

With schools and other educational institutions being at the forefront of learning, it is imperative for its leaders to be able to evaluate its capabilities and look for additional resources from potential partners and sources of funds to ensure access and quality educational services (UP College of Education 2020; DepEd 2020c).

## Education Planning and Financing amidst the COVID-19 Pandemic

The World Bank (2020) stated that economic shocks will have severe consequences for both governments and households, and it will hit both the demand for and supply of education. Government priorities have also shifted to financing the health sector and mitigating economic impacts of this pandemic. Additionally, UNESCO (2020)

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highlighted the need to expand national and local capacities to assure the access to education as education resources were scarce even before the COVID-19 pandemic.

For this reason, the DepEd identified key strategies to finance the implementation of the BE-LCP. It includes internal recalibration of budget through alignment and modification of programs, activities, and projects and the use of available balance of the school's maintenance and other operating expenses (MOOE); as well as maximizing external fund sources such as the local government units (LGU)'s special education fund (SEF), and partnerships with organizations and stakeholders.

However, LGUs have raised concerns that their budget allocation has prioritized COVID-19 health responses and may not be enough to accommodate the needs of its learner population (Deña 2020). Furthermore, local taxation is expected to be lower this season due to disrupted economic activity, thus, will impact a decrease in SEF shares.

At the division and school level, the annual *Brigada Eskwela* and the *Oplan Balik Eskwela* are identified as entry points for partnerships and assistance to prepare for the opening of classes. Due to this pandemic, school preparation activities are set from June to end of August, but partnership initiatives shall be implemented throughout the school year (DepEd 2020c). However, with this year's *Brigada Eskwela* focusing on addressing health-related needs and resource gaps in their continuity plans, some schools were observed to be duplicating relief efforts of LGUs by prioritizing the need for health resources more than education-related financing. Also, there seems to be inadequacy in communicating identified priority needs that is aligned with investment areas for partners.

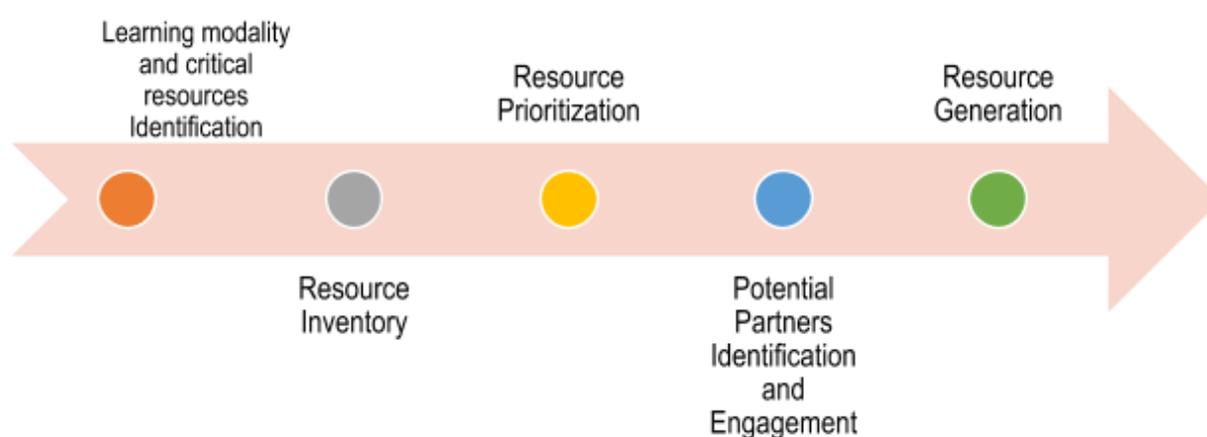
Cognizant of these, this note aims to identify a systematic process for resource management, generation, and mobilization to ensure operationalization of learning continuity plans. It also aims to provide recommendations on a needs-based, targeted, strategic, tiered, and collaborative education financing. This entails stakeholder collaboration which cuts across learning delivery modes, technologies and strategies, curriculum adjustments, and professional development of teachers and school leaders.

### **The Education Resource Generation Process**

Resource mobilization in the Philippine basic education system may be traced back to the history of inadequacy of resources and remains to be a consistent finding in various major pioneering education evaluation studies. Building and sustaining partnerships among stakeholders have been identified as important in delivering quality education to learners (San Antonio 2019). Moreover, supporting learning continuity during this pandemic demands more capital and technologies which will heighten the inadequacy of existing resources.

Education resources can be systematically generated after thorough review of resource needs, resource availability, and identified priorities. However, this must be done quickly with a key message that education must continue as it is life-sustaining especially during disruption (UNICEF 2013). Delays in identifying school needs and in allocating budget would mean that a significant amount of funding goes unspent which might eventually disrupt school operations (World Bank 2016).

**Figure 1** shows a five-step process on education resource generation to help education leaders and stakeholders swiftly manage gaps in resources. This is based on the resource mobilization theory, a structural perspective of social movements and gaining access to key resources to pursue a common agenda (McCarthy and Zald 1977; Edwards and McCarthy 2004).



**Figure 1.** Education Resource Generation Process for Learning Continuity Plan (Adapted from McCarthy and Zald 1977; Edwards and McCarthy 2004)

Given the urgency of mobilizing and generating resources during this pandemic, it is imperative for education resource generation to be needs-based, targeted, strategic, and collaborative. The following sections provide simplified processes to enable DepEd schools and other academic institutions to finance and operationalize their learning continuity plans. This will also enable school leaders to maximize resource potentials and govern partnerships with education stakeholders.

### **Process 1: Identify Learning Modality and Critical Resources**

*What must be considered in each modality and what resources are needed?*

Because of the pandemic, the DepEd BE-LCP (DepEd 2020c) mandates a no face-to-face policy until its safe, therefore schools and educational institutions must take into account the operations of each learning modality and the critical resources that are necessary to implement such modality.

The DepEd described other non-face-to-face modalities as distance learning (e.g., modular, online, TV/radio-based instruction) where learners and teachers are located in separate areas during instruction, and homeschooling (ibid.). The prescribed Learners Enrolment Survey Form (LESF) in the enrolment process indicated in DepEd Order No. 8, s. 2020 and results of other stakeholders’ consultation activities shall be contributory in determining specific types of learning modalities under distance learning (DepEd 2020b).

Table 1 shows a list of critical resources needed to implement the two primary learning modalities in the context of the COVID-19 pandemic. This is based on the resources identified by the Inter-Agency Network for Education in Emergencies (INEE 2010; INEE 2020) and the DepEd (2020c). Other resources needed may vary depending on the localized BE-LCP and prevailing health situations. This may guide school leaders to determine the learning modality that they can afford and implement as well as the resources required to implement such.

**Table 1.** Critical Resources Needed for the Learning Modalities

Learning Modality	Critical Resources Needed			
	Teachers and Personnel Needs	Learners Needs	Teaching-Learning Needs	Learning Environment, Health Safety Standard Needs
<b>Remote/ Distance learning (Non-Physical Face-to-Face)</b>	<ol style="list-style-type: none"> <li>1. psycho-social and mental health support</li> <li>2. laptop/mobile phone</li> <li>3. internet connection/ mobile load</li> <li>4. protection interventions</li> <li>5. professional development</li> </ol>	<ol style="list-style-type: none"> <li>1. psycho-social and mental health support</li> <li>2. laptop/mobile phone</li> <li>3. internet connection/ mobile load</li> <li>4. protection interventions</li> </ol>	<ol style="list-style-type: none"> <li>1. learning resources and materials</li> <li>2. communication platforms (e.g., broadcast system and feedback mechanism)</li> <li>3. parent engagement</li> <li>4. competencies in distance education</li> </ol>	<ol style="list-style-type: none"> <li>1. personal safety and protective equipment</li> <li>2. multivitamins</li> <li>3. home learning spaces</li> <li>4. water and sanitation hygiene at home</li> </ol>
<b>(Physical) Face-to-Face</b>	<ol style="list-style-type: none"> <li>1. psycho-social and mental health support</li> <li>2. orientation on proper respiratory etiquette</li> <li>3. reusable learning materials</li> <li>4. testing protocol</li> </ol>	<ol style="list-style-type: none"> <li>1. psycho-social and mental health support</li> <li>2. orientation on proper respiratory etiquette</li> <li>3. transportation services</li> <li>4. testing protocol</li> </ol>	<ol style="list-style-type: none"> <li>1. learning resources and materials</li> <li>2. parent engagement</li> </ol>	<ol style="list-style-type: none"> <li>1. personal safety and protective equipment</li> <li>2. thermal scanners</li> <li>3. cleaning and disinfecting equipment (for routine cleaning of workstations)</li> <li>4. face masks/ shields, gloves,</li> </ol>

Learning Modality	Critical Resources Needed			
	Teachers and Personnel Needs	Learners Needs	Teaching-Learning Needs	Learning Environment, Health Safety Standard Needs
	5. transportation services	5. adapted school-based feeding		protective equipment 5. water and sanitation hygiene in schools 6. multivitamins 7. learning spaces with isolation facilities (e.g., cubicles or desk separators)

In both cases, modalities require generation of resources to ensure health and safety of education stakeholders, as well as the provision of quality education, which covers the overall goal of education during this pandemic.

**Process 2: Conduct a Resource Inventory**

*How to identify available and needed resources?*

Once the learning modality and specific critical resources to implement such modality were identified, there should be a rapid inventory of available resources within the school and affected populations. A resource inventory provides the baseline information on their resource capacity and helps the school identify the resource gaps that need to be addressed.

School leaders must assess available resources vis-à-vis needed resources together with the potential resources of partners. This is to optimize capacity and be able to use all available resources.

One should consider community resources such as (1) human resources, which include labor, experience, skills, and expertise; (2) material resources, such as funds, equipment, supplies, and other tangible artifacts; (3) moral resources, including solidarity support, sympathetic support, and celebrity; (4) social-organizational resources that are created specifically to further social movement for gaining access to other types of resources; and (5) cultural resources which include music, literature, blogs, web pages, or films/videos that may be used as learning resources (Edwards and McCarthy 2004).

Furthermore, schools should use the current enrollment and school data with pertinent information on student-teacher populations, class assignments, and possible

learning strategies (DepEd 2020b) to identify the type and quantity of resources needed. This data is also important in coordinating and setting up partnership plans. It should be noted that the inventory should address both short- and long-term plan requirements.

The continuum of the resource needs and availability is shown in Table 2 to systematically account for all resource pools and sources. It includes special appropriation from the national government that may be downloaded by DepEd Central Office to its field offices, the existing and/or realigned MOOE at the school level, and appropriation from the SEF and General Fund as provided for the Local School Boards, Sanggunian (councils), and local chief executives of the LGUs. The variance accounts for the remaining needs that should be mobilized.

**Table 2.** Resource Inventory Matrix

School Resource Inventory Matrix								
Learning Modality to be Implemented:								
Number of Students:								
Number of Teachers and Personnel:								
Resources Needed	Resource Availability			Resource Generation				
	Quantity Needed ( $Q_n$ )	Quantity Available ( $Q_a$ )	Variance $V=Q_n-Q_a$	Quantity Covered by National Budget ( $Q_{cNB}$ )	Quantity that can be Sourced from MOOE ( $Q_{cM}$ )	Quantity that can be Sourced from SEF ( $Q_{cS}$ )	Quantity that can be Sourced from General Fund ( $Q_{cG}$ )	Quantity Needed for Mobilization on ( $Q_nM$ ) $Q_nM=V-Q_{cNB}-Q_{cM}-Q_{cS}-Q_{cG}$

### Process 3: Prioritize Resources

*What resources should be prioritized?*

Resource variance needed to be mobilized may be enormous and overwhelming. As in the normal education context, allocation mechanisms can be improved through better planning (World Bank 2016). Systems currently used to allocate resources to schools could be strengthened by giving funding decisions at the school level to account local conditions.

Similarly, methods of financing and criteria for prioritization must be resolved in investment policies such as the goal achievement matrix approach of the National Economic and Development Authority (2007). This may be adopted to improve education resource planning based on the identified learning modality and resource baseline information that were accomplished in the previous sections.

It is important for school leaders to identify objectives in implementing a specific modality based on its operational contexts and relevance for stakeholders. What must be considered in delivering the identified modality? What protocols must be enforced? For example, effects of a no-face-to-face learning modality such as online learning might cause anxiety, thus “to create a sense of normalcy” is an objective that must be met in carrying out this modality.

Each objective is then identified with corresponding critical resources. To achieve the sample objective, critical resources such as psycho-social support and feedback mechanisms must be present or available. Its presence or availability is referred to as objective criteria, which can easily be assessed.

The development of objectives also allows the contextualization of the over-all BE-LCP objectives based on local conditions. To prioritize resources, weight scores are given to (1) specific objectives depending on how necessary these are in implementing a modality, then to (2) criteria based on their respective contribution to the objective. Subsequently, criterion weight is determined by multiplying the two weights together. Table 3 shows the steps in developing a prioritization scale needed to score the development objectives per learning modality, while Tables 4 and 5 provide sample evaluation criteria with responses.

**Table 3.** Steps in Developing a Prioritization Scale

1	Identify learning modality to be implemented
2	Identify specific objectives for the learning modality
3	Assign weights to each objective ( $W_o$ )
4	Define specific criteria against which the objectives can be assessed (e.g., availability or cost of resource)
5	Assign weights ( $W_c$ ) to each criterion representing their respective contribution to the objective
6	Determine each criterion weight ( $W = W_o * W_c$ )

If a resource is readily available and sufficient, the next ranking priority resource shall be considered or mobilized. This process may provide more efficient and effective resource generation for schools and other personnel. This will also ensure that the learning continuity plan and resource generation activities are aligned. Other ranking of needs may also include feasibility, desirability, and cost.

**Table 4.** Sample Evaluation Criteria on Learning Modality and Resources (Remote/Distance Learning)

Learning Modality	Objectives	Weight Assigned to objective ( $W_o$ )	Objective Criteria	Weight Assigned to Objective Criteria ( $W_c$ )	Criteria Weight ( $W = W_o * W_c$ )
Remote/Distance learning (Non-Physical Face-to-Face)	To create sense of normalcy	0.30	Psycho-social support mechanisms are in place	0.80	0.24
			Feedback mechanisms are available	0.20	0.06
	<b>Objective Total</b>	–	–	<b>1.00</b>	<b>0.30</b>
	To attain learning competencies	0.50	Learning devices are available	0.40	0.20
			Access to learning platforms is stable and available	0.40	0.20
			Learning materials are available	0.20	0.10
	<b>Objective Total</b>	–	–	<b>1.00</b>	<b>0.50</b>
	To ensure safety and readiness of teachers and personnel	0.15	Learning resources and references are available	0.70	0.11
			Nutritional needs of teachers and personnel are provided	0.30	0.05
	<b>Objective Total</b>	–	–	<b>1.00</b>	<b>0.15</b>
	To provide nutritional needs of students	0.05	Nutritional needs of students are provided	1.00	0.05
	<b>Objective Total</b>	–	–	<b>1.00</b>	<b>0.05</b>
	<b>Total</b>	<b>1.00</b>	–	–	<b>1.00</b>

**Table 5.** Sample Evaluation Criteria on Learning Modality and Resources (Physical/Face-to-Face Learning)

Learning Modality	Objectives	Weight Assigned to objective (W <sub>o</sub> )	Objective Criteria	Weight Assigned to Objective Criteria (W <sub>c</sub> )	Criteria Weight (W = W <sub>o</sub> * W <sub>c</sub> )
<b>(Physical) Face-to-Face</b>	To ensure compliance to health standards	0.50	Personal protective gears and apparels are available and sufficient	0.20	0.10
			Personal hygiene mechanisms are in place	0.40	0.20
			Environment hygiene mechanisms are in place	0.20	0.10
			School health protocol information materials are available	0.05	0.03
			Nutritional needs of teachers, personnel, and students are provided	0.15	0.08
	<b>Objective Total</b>	–	–	<b>1.00</b>	<b>0.5</b>
	To ensure safety and readiness of teachers and personnel	0.10	Mobility services are available	0.30	0.03
			Learning resources and references are available	0.70	0.07
	<b>Objective Total</b>	–	–	<b>1.00</b>	<b>0.10</b>
	To create sense of normalcy	0.10	Psycho-social support mechanisms are in place	1.00	0.10
	<b>Objective Total</b>	–	–	<b>1.00</b>	<b>0.10</b>
	To attain learning competencies	0.30	Learning materials are adequate	0.40	0.12
			Learning spaces are safe and available	0.60	0.18
	<b>Objective Total</b>	–	–	<b>1.00</b>	<b>0.30</b>
	<b>Total</b>	<b>1.00</b>	–	–	<b>1.00</b>

The resource ranking based on the evaluation criteria is important in identifying and engaging possible partners in generating resources.

**Process 4: Identify and Engage Potential Partners**

*How and which education partners to engage?*

The previous sections provided a systematic approach in developing a resource inventory and determining resource priorities. As such, the identified resource needs

may be generated through education stakeholders such as the business sector, non-governmental organizations (NGOs) and even international organizations.

It is important that the type of need will determine which partner and type of partnerships are needed. Institutions need to decide on a partnership selection criteria and profile of the proposed partner institution to look for (DepEd 2018). Partnerships anchored on a systematic assessment of needs and identification of partners will help in strategizing allocations, avoiding unnecessary donations, managing unused resources, and repurposing mismatched investments. The key would be mutuality of interest of both parties in pursuing the investments in education.

Here are some suggested strategies to efficiently match the resource priority list with potential partners:

*Rapid Potential Partner Census and Matching Guide*

- (1) Revisit the list of school stakeholders who have provided similar resources in any previous or existing partnership. It is easier to re-engage them since mutuality has already been developed which makes it an opportunity to expand or scale up the partnership.
- (2) Engage the Local Business Permit and License Office or the Department of Trade and Industry Provincial Office to generate a list of micro, small, and medium enterprises (MSMEs) in the locality. It is more efficient to match resources with the line of business or advocacy of potential partners.
- (3) Provide a motivation for partnership that will benefit potential partners. The partnership will achieve both DepEd's learning continuity goals and the business sector's recovery.
- (4) Develop a menu of possible investments for potential partners at school, division, and regional level for equity at levels of governance.
- (5) Develop partnership proposals depending on the resource and partnership requirement.
- (6) Provide an accessible/remote engagement and agreement processing platform to minimize contact and exposure. An online dashboard of investments both from DepEd and LGUs is needed to increase transparency, improve results, and management information.
- (7) Communicate partnerships to a broad audience. This will encourage more supporters of education and will establish a community of advocates.

Figure 2 provides a quick guide on the partnership levels in the DepEd. This is helpful in identifying and engaging education partners across various sectors and levels of education governance.



**Figure 2.** Partnership Levels in the DepEd

It is crucial that schools and education agencies provide a holistic approach in identifying partners for three primary reasons: (1) mutuality of objectives rather than a solicitation of what the schools need; (2) duplication of identified partners to prevent donor fatigue, especially at the local level; and (3) economies of scale to provide the maximum financing for identified resource needs.

The education resource generation process accounted for needs, means, targets, priorities, and strategies across education governance tiers and sectors for a systematic and strategic approach to learning continuity plans.

As learning is essential to realize education promises, aligning actors will make the entire system work for learning (World Bank 2018). Extricating technical and political barriers at the system level will enable learning at the school level. As such, enabling policy environment and institutional mechanisms can expedite reform and deliver results for education resource generation outcomes.

These unforeseeable circumstances and unprecedented disruption in the education sector has required an equally unprecedented need for collaboration among stakeholders and synchronization across practice, process, and policy.

## **Enabling Policy Directions and Strategic Recommendations for Education Resource Generation**

This final section provides recommended enabling policy directions and strategies for each education stakeholder group to maximize the potentials for education resource generation in times of the COVID-19 pandemic. This ultimately hopes to advance education resource generation and financing towards the new normal.

### *Education Leaders*

- (1) Conduct rapid assessment on education infrastructure, access and learning environment, teachers, teaching-learning process, and other resource needs at school and division level to determine interventions to be implemented as well as to identify the specific investments that partners can make in the LCP.
- (2) Activate Disaster Risk Reduction and Management Council (DRRMC) education cluster to include stakeholders in ensuring learning continuity and developing COVID-19 response plans. This will establish collaborative monitoring and evaluation mechanism among stakeholders.
- (3) Relax partnership agreement requirements and other bureaucratic impediments. This will facilitate more efficient partnership processing within the bounds of legal bases for education partnerships and limitations (Section D of DepEd Order No. 40, s. 2015).
- (4) Advocate for schools to determine the menu of education investments under the Learning Continuity Plan. A predetermined menu will let the partners know what their engagement will be like. This will shift from an off-the shelf solicitation to a demand-driven partnership.
- (5) Define how stakeholders will be engaged. Avoid motherhood statements such as request assistance from the LGU through the SEF or engage stakeholders.
- (6) Analyze capacity development needs and implement interventions at the school level.
- (7) Develop a strategic communication plan of goals and learning interventions during this pandemic.

### *Local Government Leaders*

- (1) Mobilize community partners to invest in infrastructure identified by schools (e.g., encouraging community broadcast stations to waive fees for education broadcasts/e-learning of schools).
- (2) Revisit and adjust available appropriations to include education continuity in local COVID-19 response and recovery plans.
- (3) Revise SEF allocation plan to address education needs within the ambit of Local Government Code of 1991 [Republic Act (RA) 7160] and Joint Memorandum Circular 1, s. 2017 of DepEd, the Department of Budget and Management (DBM), and the Department of the Interior and Local Development (DILG). The revised SEF should consider the LCP.

- (4) Invest through the SEF on technologies and infrastructure aimed at improving the off-school learning infrastructure, both in the short and long term.
- (5) Undertake the necessary emergency procurement in accordance with the Bayanihan to Heal as One Act (RA 11469) and NPM 004-2020 of the Government Procurement Policy Board.

*Policymakers and Legislators*

- (1) Expand allowed expenses chargeable against the SEF to address other education needs of LGUs in COVID-19 education response.
- (2) Revisit the Children's Television Act of 1997 (RA 8370) to expand daily allotment of airtime for educational children's programs for broadcasting networks in times of pandemic and other national emergencies as well as to expand implementation among other broadcast platforms such as radio and internet.
- (3) Formulate local tax incentives for businesses and other sectors who will support the LCP.

*Business Sector*

- (1) Assist in the provision of needs in COVID-19 education response to avail of 150% tax incentives under the Adopt-A-School Program in accordance with RA 8525 to lessen income tax payments and advance corporate social responsibility efforts.
- (2) Recalibrate corporate social responsibility (CSR) programs in education to support the learning continuity plan and strengthen non-face-to-face platforms for learning. The support needed from private sector is to retrofit their CSR programs towards the LCP.

*Civil Society, Local Communities, and Parents*

- (1) Enable community and home-based learning modalities as a major Parent-Teacher Association (PTA) endeavor.
- (2) Assist in the provision of needs in COVID-19 education response.
- (3) Advocate for continuity of learning to mitigate further effects of COVID-19 in social and economic aspects.
- (4) Develop a community of home educators to serve as pseudo parents for parents not able to assist their children.

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