

1963

¡Celebra!

**The History of the
Puerto Rico and
Latin America Office**

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The History of the Puerto Rico and Latin America Office

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edited by Michael Farah

Part I: The Foundation Years: 1957 to 1969

Introduction

On February 15, 1964, more than 11,500 very nervous high school seniors came to 53 public and private schools located in large cities and small towns across the island of Puerto Rico to take a college admissions examination. Whether fully aware of it or not, these students were participants in a truly historic event that was to transform the transition to college process on their island to this day and that was to influence the transition to college process in many countries in Latin America.

The event was historical because it broke new ground in many ways. First: Never before had all students applying for college in Puerto Rico taken the same entrance examination, and on the same date. Second: This entrance examination was of a different nature from the entrance examinations usually administered by each of the higher education institutions.¹ Actually, there were two exams: one measuring aptitude or developed abilities for college studies through verbal and mathematical sections, and the other an English as a Second Language test. Third: These tests had been developed by a private U.S. mainland educational organization, the College Entrance Examination Board, which only the previous year had established an office in Puerto Rico in an unprecedented experimental agreement with the five island universities and the Puerto Rico Department of Education. Fourth: The exam was being administered by high school teachers and principals, not by staff from the colleges. Fifth: The aptitude test, although developed in Spanish in Puerto Rico by an international committee of examiners, was modeled after the Scholastic Aptitude Test (now referred to as the SAT®) sponsored by the CEEB and widely used for admissions by many institutions in the United States and taken by thousands of students in many countries. Sixth: It was the first time that a foreign language version of the SAT was administered anywhere.

The roots of this historic event go back several years and are closely related to the ideas and work of key personalities at the CEEB and in Puerto Rican higher education, as well as to personalities and developments in the broader social environment in both the United States and Puerto Rico.

A. The Birth of the Idea and the Conditions That Made It Possible

1. The CEEB: origin and purpose of the organization. The introduction of the first common entrance examinations. The development of the SAT in the twenties. The new Achievement Tests in the thirties. New programs and a period of rapid growth in the fifties and early sixties.

The CEEB was founded in the year 1900 as an association of 12 institutions of higher education in the northeastern United States with the purpose of establishing a common set of courses as requirements for admissions and developing well-defined examinations to test college applicants' knowledge in those subjects. The presidents of Columbia University (Nicholas Murray Butler) and Harvard (Charles Eliot) were major forces behind the specific foundation (the CEEB was for several decades located on the Columbia campus), and the vision of the traditional leading American colleges surely played a major role in the early, and somewhat difficult, history of the organization. But concern with the transition from secondary education to college had been increasing through the last decades of the nineteenth century. Many educators and secondary school headmasters thought that the array of examinations prepared by each college, the lack of some uniformity in the curriculum, the absence of defined standards of achievement, and the subjective nature of many of the admissions criteria were creating difficulties for the students, the schools, and the colleges.²

1. The College of the Sacred Heart, a small liberal arts college for women, had administered the SAT from 1951 to 1953, and from 1960 to 1962.

2. This concern was also related to important changes going on in American higher education, especially after the Morrill Act of 1862. New types of institutions were being established based on different philosophies and social goals, such as the state land-grant colleges and the special interest colleges. These decades also saw the beginnings of graduate education and its development into graduate departments and graduate schools, under the influence of the German university model. There was substantial concern about the quality of higher education, and the idea of accreditation was also a product of the period.

These educators argued that having a group of examinations based on detailed content specifications agreed upon by all, administered on several sites on a single date, and scored using well-defined and uniform criteria, would make transition to college more expedient and improve preparation for college. Students from any secondary school would have a valid credential independent of geographical, social, and personal background and of the recognition or lack thereof of the schools from which they graduated. Preparing students for college would be more manageable for schools, less cumbersome for students, and ultimately more efficient for colleges. In a period when more students were applying to college, this would facilitate the transition process for these key players. And eventually, this would come to support a more democratic expansion of opportunities for all.

The first CEEB exams, administered to mostly Columbia and Barnard College applicants on June 17, 1901, were achievement essay-type exams in subjects that the traditional colleges considered important: English, French, German, Latin and Greek, history, mathematics, chemistry and physics. The following year, examinations in Spanish, botany, geography, and drawing were added. The history of the common examinations and the use given to them even by the initial members of the CEEB was far from smooth, and although growth was continuous, it was slow. During the twenties, two major developments deeply influenced admissions testing. One was an emerging new concept of achievement testing that focused on understanding of relations, formulation of generalizations and principles, and the application of knowledge, as opposed to the repetition of memorized facts and information. This “New Plan” provoked negative reactions from different sectors of the educational community, but the CEEB gradually introduced comprehensive achievement tests, still of the essay type, but based on less prescriptive detailed content for each subject. The six-day essay examinations were regularly administered until June 1942, coexisting for several years with the new type of test that was the second important development in CEEB admissions testing during the twenties: the Scholastic Aptitude Test.

The SAT was based on advances made during the World War I period in the measurement of general abilities to classify large populations of Army recruits using multiple-choice questions. The CEEB appointed a commission to study these advances and their possible use for admissions testing. Upon recommendation from the commission, a committee of experts was appointed, which included Carl C. Brigham, professor at Princeton and one of the designers of the Army Alpha tests, to draw up a plan for developing a new type of admissions test, which they named the Scholastic Aptitude test. The new test was administered for the first time on June 23, 1926, to 8,040 students. In 1929, the SAT was divided into two sections with separate scores: Verbal Aptitude and Mathematical Aptitude. The SAT’s new approach to admissions testing was not immediately accepted, and the essay subject-driven examinations administered in June every year continued. But in 1937, the CEEB took another step in the transformation of admissions testing when it introduced multiple-choice Achievement Tests which measured broadly defined subject matter in line with the principles of the “New Plan” of the preceding decade. The traditional essay Achievement Tests continued until World War II forced Harvard, Yale, and Princeton to begin the academic year in summer. The June essay tests date was too late for the selection process so they opted for the April multiple-choice Achievement Tests administration. More institutions followed suit, and by the end of the war, as George Hanford describes it: “Colleges had become used to the new instruments, and as far as I have been able to discover, no serious thought was ever given to returning to the pre-war College Boards.” (Hanford, 1991)³

During the fifties, several new programs were introduced to facilitate transition to college at a time when the expansion of higher education accelerated. The College Scholarship Service® (1954) was established to facilitate the application for and the adjudication of financial aid by establishing a uniform process to determine financial need. The Advanced Placement Program® (1955), originally sponsored by the Ford Foundation, is a program which allows students to take college courses while in secondary school and earn credit at the college of their choice. The Preliminary SAT (1959) (now the PSAT/NMSQT), a shortened and easier version of the SAT, provided information on the student’s verbal and mathematical aptitudes before the senior year that could be used for guidance and to familiarize the student with the type of test they would be facing for admissions. The College-Level Examination Program® (CLEP®), originating with the Carnegie Foundation, allows adults to receive credit by examination for knowledge they have acquired through work experience or by themselves. The contributions of the CEEB went far beyond these programs. During these years, the organization played an important role in the professionalization of

3. This section borrows freely from Chapter I of *The College Board Technical Handbook for the Scholastic Aptitude Test and Achievement Tests* (CEEB, New York, 1984); and from George H. Hanford, *Life with the SAT: Assessing Our Young People and Our Times*, (CEEB, New York, 1991). These are the most complete descriptions and interpretations of the early history of the CEEB and the SAT that I have found.

two higher education functions: It helped college admissions officers create an identity for themselves as a profession apart from registrars and helped establish the student financial aid profession to implement the concept of financial aid.

Thus, in the early sixties, the CEEB, already a strong national organization with more than a half century of history behind it, began to consider becoming engaged in educational activities beyond U.S. borders.

2. The emergence of an international role for the CEEB. Frank Bowles and the International Study of University Admissions. The idea of a Spanish SAT®. The antecedents to the SSAT and the PRO.

During the early sixties, the CEEB engaged in a number of initiatives in the international arena. The person most responsible for these activities was Frank H. Bowles, who directed the organization from 1948 to 1963, first as executive director and, after 1957, as its first president. George Hanford, College Board president from 1979 to 1987, describes Bowles's leadership as follows:

The College Board's formal participation in international education really developed as a result of the involvement of its first president . . . Frank H. Bowles, in the conduct of an international study of university admissions on behalf of UNESCO during a two-year leave of absence in the early 1960s. (Hanford, 1991, Page 140.)

Prior to becoming chief executive of the CEEB, Bowles was director of admissions at Columbia University, an institution that received a good number of foreign students attracted by the prestige of its faculty, its graduate departments, and research programs. He was well aware of the difficulties faced by foreign applicants in obtaining information, communicating with the institution, getting credentials understood and accepted, taking examinations in English, and adapting to a different environment. Many of the foreign students were from Latin America, and in 1947 Bowles recruited a young Puerto Rican specialist in public administration, with a master's degree from Syracuse, as his assistant charged with providing needed support services to these foreign applicants. In 1948, Bowles left Columbia to become director of the CEEB, and his assistant, Adolfo Fortier, returned to Puerto Rico to begin his professorial career at the School of Public Administration of the State University in Río Piedras. But that year they spent working together in New York was enough to establish a close relationship that would be important for Bowles's future endeavors.

Bowles was no stranger to Puerto Rico. He had been a consultant to Inter American University and twice (1937 and 1946) had been involved with the accreditation process of the University of Puerto Rico (UPR). The first time he recommended that no accreditation process be initiated because the university's governance structure did not meet the Middle States Association of Colleges and Secondary Schools (MSACSS) requirements. This recommendation was harshly criticized by the university's board of trustees who accused him of having heard only one part of the story. The second time, he presided over the Committee of Evaluators from the MSACSS that recommended accreditation for the university. In 1942 a new University Law established the Superior Educational Council with dual functions as board of trustees for the state university and licensing organism for private higher education and removed from the governing board the representatives of the legislature. It was during this visit that he met Fortier, then an assistant to Chancellor Jaime Benítez, and requested that the chancellor grant Fortier a leave of absence to move to Columbia for a year. In 1953, Bowles was asked to study the viability of a graduate school for UPR. He lived with his family for several weeks in Puerto Rico, on leave from the CEEB. His report, presented to the Council in 1954, was a comprehensive assessment of the state of the university, the need for strengthening undergraduate education before creating a graduate school, and the need to expand opportunities for higher education with a system of junior colleges in large cities. If this were not done, the pressures of students demanding access would require the establishment of "a serious student selection program." (Superior Educational Council, University of Puerto Rico, *Minutes of the Special Meeting of 7th of May, 1954, called to hear Mr. Bowles's Report*, Page 10). It is interesting that Bowles did not call then and there for using a test such as the SAT for selection. But we know that by 1957, Bowles and Benítez began exploring the idea of a common entrance examination in Spanish for Puerto Rican institutions.

The international study of admissions which Hanford identifies as critical for the CEEB's initiation in international education was a joint project of UNESCO and the International Association of Universities, made possible with

a \$250,000 grant from the Carnegie Corporation in New York. It began in 1960 and was completed in 1962.⁴ The CEEB acted as fiscal agent for the grant. In 1961, Bowles offered Fortier a position as his second in command in the International Study (Frank Bowles, *Letter to Adolfo Fortier*, January 6, 1961). But Fortier had a commitment in Venezuela as a consultant to the Commission on Public Administration that was engaged in reforming government administration in that country.

After his initial travel to South America to set up the international study, Bowles became convinced that more students from the region would be applying for admissions to United States institutions, and that new strategies were called for in the way they were selected and admitted, and that guidance needed to be improved. The possibility of developing a Spanish version of the SAT was on Bowles's mind as one of the strategies to facilitate the admission of Latin American students. That he felt this was an important part of his legacy to the organization is evident when he comments in his last report to the annual CEEB meeting in Chicago on October 30, 1963, reproduced in his book: *The Refounding of the College Board: 1948-1963*, (CEEB, New York, 1967):

The construction of a Spanish-language version of the SAT had been on my mind since July and August 1961, when I had visited several South American countries.... Aside from this item, my other interest in the report lay in the discussion of foreign student testing and admissions, which I had come to feel was not receiving the kind of handling it really required if we, as a nation, were to get reasonable return on the very large sums expended on importing and educating foreign students. (Bowles, 1967, Page 319.)

In fact, the number of Latin American students in the United States had indeed been growing, from about 8,000 in 1953-54 to over 11,000 in 1962-63 (*Experiment in Puerto Rico*, Reprint from *The College Board Review*, Spring 1964, No. 53, Page 6.) In addition, he had perceived that there was some interest in adapting the American model of admissions to their countries.

On October 26, 1961, Bowles wrote Chancellor Benítez to request his support for the idea, reminding him that several years before they had had “conversations in which we both expressed interest in the possibility of the Board building a Spanish version of the Scholastic Aptitude Test” for use by all institutions in Puerto Rico. (Bowles: *Letter to Chancellor Benítez*, October 26, 1961). He mentions two previous unsuccessful attempts to start the project, including sending the Board's Vice President for Examinations, Mr. Kendrick, to explore its viability in Puerto Rico. Kendrick reported that the project would be too expensive. The Board had other pressing issues and the idea was put on hold. However, his recent trip to South America had convinced him of the need for a SSAT and he planned to bring the issue before the Trustees and convince them that this was the time to move ahead. Bowles told Benítez: “I still believe that the Board would probably lose money on such a venture and might continue to lose money for several years. However it would be **a genuine public service operation well worth doing** if it appeared that there is this time sufficient demand for it.” (Page 1, bold type mine)

The CEEB president wanted to know if the acknowledged higher education leader in Puerto Rico was willing to support the idea. He asked Benítez a two-part question: Would the University of Puerto Rico be willing to use the test for admissions? and, if the UPR agreed to use it, would the other institutions follow? Assuming that the answer to the preceding questions was positive, Bowles asked for specific support in terms of “lending” the Board a university psychologist for a few weeks, and facilitating the pretesting activities providing several groups of students. This psychologist would be part of a team of three persons to which the Board would give the responsibility of developing the test. The letter categorically stated that “the Spanish version of the SAT would be fully equated with the English version and interchangeable with it.” Since Bowles was not a psychometrician, one must ascribe this assertion to his enthusiasm or to a bout of wishful thinking. The idea is not expressed as categorically in any other document that we have examined, although the goal of having some equivalence between the two tests' scores remained alive until William Angoff, the distinguished psychometrician from ETS, conducted two research projects in 1973 and 1988. In

4. The study was conducted by local researchers in 12 countries distributed in all major regions of the world. Bowles wrote the comprehensive report and returned to the CEEB in October 1962. The two-volume study was published in 1965 (UNESCO/IAU, Paris, 1965). The first volume consisted of Bowles's report and the second volume included the 12 national reports. Latin America was represented by Brazil and Chile. One of the two researchers from Chile was Erika Grassau, who later became Director of the Institute of Statistics at the *Universidad de Chile*. She would play an important role later in the development of the Spanish SAT as a member of the first committee of examiners of the SSAT and in the piloting of this test in Chile. Through her work, the SSAT or *Prueba de Aptitud Académica* became a model for Chile's own national test.

any event, Chancellor Benítez did bring up the issue in his response.

Chancellor Benítez's response, dated November 3, 1961, was positive but guarded. He explained that they had very recently established an admissions office, separate from the registrar's office, and transferred to it the responsibility for developing the admissions test. A young psychologist, Eduardo Rivera-Medina, had been appointed to direct the office. The test had been updated and included five sections: Spanish, English, Mathematics, Reasoning, and General Information, and for the first time, a \$10 fee was charged. He expressed much interest in a common scholastic aptitude test in Spanish, and he believed that if UPR would use the test, other institutions would follow sooner or later. He reminded Bowles that Catholic University had previously favored the idea. But, he added, "We cannot commit ourselves in advance, of course, to the use of your test, when and if it is developed." (Jaime Benítez, *Letter to Frank Bowles*, November 3, 1961, Page 2.) He stated that with the recent initiative to establish the admissions office, it may well be that the best course is to strengthen the homemade test. Then Benítez brought up the issue of the SAT and the SSAT being fully equated and interchangeable. Obviously Mr. Rivera-Medina, with whom Benítez had met the day before to prepare the response, had advised him about the difficulties in translating and equating tests in different languages because "language and cultural skills condition the validity" of any test. Most probably this questioning was crucial in the Board's decision not to translate the SAT but to develop a similar test in Spanish.

The communication ended, however, in a very positive tone, as Benítez stated:

I may add that the enormous advantages that would result from a common test or at least a test with some common features throughout the Americas would constitute such a tremendous advantage that the many difficulties in the way should not hold us back in such an undertaking. (Page 3.)

This was indeed what Bowles wanted to hear, for it seems evident that he had decided that Puerto Rico could provide a solid base for the SSAT if all the institutions would agree to require it, that Chancellor Benítez would be the leader to convince them, and although not mentioned in his letter to the chancellor, that Fortier was the person to carry the idea through. Sometime before his letter to Benítez, Bowles had met with Fortier in Venezuela, and they discussed the need for a thorough survey of admissions in Latin America and the viability of developing a Spanish version of the SAT for use in Puerto Rico and perhaps in other Spanish-speaking countries. Fortier agreed to work with Bowles in a soon-to-be-proposed project. In December 1961, Bowles recommended to the College Board Trustees that a special survey on these possibilities be undertaken and suggested that Fortier conduct it. The Trustees accepted both suggestions. On March 15, 1962, Fortier formally notified the Venezuelan Commission that he could not continue as their consultant because he would be conducting a study for the College Board and then returning to his teaching position in San Juan. From March through July of 1962, Fortier conducted the study, traveling extensively through Latin America. For a short period he was joined by George Hanford, an assistant to Bowles who later became president of the College Board. Fortier submitted his report in December 1962. What he found, the recommendations he made, and what happened afterwards will be presented later.

Human touch anecdote: In the year 1947, Matilde Díaz, a young lady recently graduated from the College of the Sacred Heart in San Juan, applied for graduate studies at Columbia University. For reasons unknown, she was admitted to Teachers College. Desiring to study in the well-known Department of Spanish at Columbia proper, she asked for help from a young assistant to Chancellor Benítez, whom she had read in the newspaper would soon move to Columbia as assistant to the Director of Admissions. The young man told her not to worry because he would help her. As soon as she arrived at Columbia, after a weeklong voyage by boat, she went to the admissions office where Adolfo Fortier had all the papers ready for her admission to the Spanish Department, and offered to show her around the campus and beyond the confines of Morningside Heights. In 1948, Adolfo and Matilde returned to Puerto Rico. They got married in 1949. In 1962, Frank Bowles appointed Adolfo to conduct the study of admissions in Latin America and the following year appointed him the first Director of the Puerto Rico Office. Matilde Fortier was appointed to teach Spanish at the University of Puerto Rico in Río Piedras, where in 1953, she taught a young freshman named Manuel Maldonado-Rivera, who 30 years later would succeed her husband as Executive Director of the College Board's Puerto Rico Office.

3. The U.S. national environment: The country strengthens its world leadership. The Kennedy Era. A new focus on Latin America. The Alliance for Progress.

Key individuals by themselves, as important as they are, do not explain the complexities of an institution's history, because any institution exists in a social and political environment that can support and stimulate it to take on new roles or can place obstacles and even impede its development. The internationalization role that the CEEB was

undertaking at the beginning of the sixties was part of a broader national interest in reaffirming the leadership role of the democratic world amidst the cold war. John F. Kennedy was elected president in November 1960, and a new vision and sense of purpose was present in Washington and the nation. It was a period of new initiatives at home and abroad; bold programs were developed; successes in space flights gave the common citizen a sense of pride and accomplishment; the White House supported the struggle for civil rights; and the resolution of the Russian missile crisis in Cuba gained respect for the president.

Internationally, there was a commitment to support developing countries and a special focus on Latin America. One of the bold initiatives of the Kennedy years was the Alliance for Progress (*Alianza para el Progreso*), an assistance program for Latin America that had a twofold purpose. On one hand, it was intended to improve social conditions, promote better income distribution, health, agriculture, and education. On the other hand, it was directed to strengthen the established democracies and inoculate them against the influence of Fidel Castro's Cuba. Many of the Kennedy administration's ideas were continued and expanded by President Johnson after Kennedy's assassination, at least until Vietnam diverted the American focus. In 1965, President Johnson, in a speech at the Smithsonian Institution and in a message to Congress, recognized the international dimension of education as an issue of national interest and called on Congress to legislate funds to support international programs in education and on private organizations to actively participate in the expansion of opportunities for educational exchanges between the United States and foreign countries.

At the College Board, the interest in providing technical support to Central and South America and its involvement in several programs to support foreign students must be seen "as part of the nation's outreach" to developing countries around the world. When the CEEB's Trustees met to discuss Fortier's report and recommendations they may have been cautious, but the nation's mood was favorable for international work, and Bowles was able to convince them and get his projects going.

4. The Puerto Rican environment. The modernization process from 1940 to 1965: The Popular Democratic Party, the advent of Commonwealth, and Operation Bootstrap. Puerto Rico as the "showcase of democracy" and the bridge between the two cultures. Dramatic expansion of education at all levels. Higher education takes off.

In addition to his early contacts with Puerto Rican higher education and his professional and personal relationship with Chancellor Benítez, there were objective reasons which moved Bowles to consider Puerto Rico as the base for his project in 1961. Puerto Rico was the ideal location in many ways. It was Latin American by language and culture, but it had incorporated American political and educational structures. The island was reaping the benefits of substantial developments in its social, political, and economic conditions. These changes began in the late thirties but gained speed after the war and in the fifties. The first development was the coming to power in the forties of a new political movement led by Luis Muñoz Marín. The Popular Democratic Party was committed to improving the life of the poor rural masses whose stark reality of malnutrition, sickness, illiteracy, and seasonal exploitation at the hands of absentee-owners of sugar cane plantations, had led the last and most sensitive American governor to call it the "Stricken Land" (Rexford G. Tugwell, *The Stricken Land*, New York, 1947.)

The second development was the struggle to modify the long colonial relationship between Puerto Rico and the United States. In 1952, after several years of negotiation with Washington, the Commonwealth of Puerto Rico came into being. The new status, although maintaining the island under the territorial clause of the U.S. Constitution, did grant substantial internal self-government powers and reduced the direct control of the president and the federal government over the internal affairs of Puerto Rico. The Commonwealth ideologues declared the end of colonial subordination, the previously proscribed Puerto Rican flag was raised next to and at the same level as the Stars and Stripes, and the idea that Puerto Rico had achieved political dignity through a compact of association with the United States became the official truth. This new status would allow Puerto Rico to maintain its cultural identity, avoid assimilation, and play a role as a bridge between the two great cultures of the hemisphere.

The third important development was Operation Bootstrap, a project to establish manufacturing as the base of the island's economy. "Sugar King" was already mortally wounded, and small-crop agriculture was no longer seen as an efficient income-producing activity, except for individual family sustenance. The industrialization of the economy soon produced more tangible and less disputed benefits for the islanders. Between 1950 and 1964, this program had directly promoted or assisted 900 factories, and the net income from manufacturing rose from 3.5 in 1950 to 62.6 in 1964. Per capita income had more than doubled, compared to the forties, and unemployment was reduced

significantly to about 13 percent. In a relatively short period of time, the per capita income of Puerto Ricans had become the sixth highest in the hemisphere.⁵

Operation Bootstrap, together with the long hegemony in power (1940 to 1968) enjoyed by the Popular Democratic Party and the psychosocial energies released by the new Commonwealth, brought about the modernization of Puerto Rico. Indeed, Puerto Rican society was now quite different from the society Bowles first encountered in the late thirties. The government gave priority to improving health, education, housing for the poor, and social welfare programs, and it was showing.

Education was conceived of as a requirement and a catalyst for individual social mobility, development of a strong middle class, for improving the quality of life of the poor, and for modernization. Expansion of educational opportunities was a priority from the beginnings of the process in the thirties but effectively accelerated with the coming to power of Muñoz Marín and the advent of Commonwealth. An innovative program of community education used films and representative and graphic arts to fight illiteracy, which by the mid-sixties was almost eliminated. Availability of elementary and secondary education was increasing, but in 1957 the government unveiled an ambitious plan to provide elementary education to 91 percent of children ages 6 to 12, and secondary education for 75 percent of children ages 13-15, and 41 percent of children ages 16 to 18. Because there were not enough schools to accept this sudden increase in students, the plan had to reduce classroom time to three to four hours so as to have an afternoon and often an early evening session. High school enrollment increased a dramatic 659 percent in 25 years, from 1940 to 1965. This was to bring higher demand for higher education particularly during the fifties and early sixties. By 1963, when the PRO was established, only half of high school graduates went on to some college education, a fact of which Frank Bowles was well aware. To support this expansion of educational opportunity the government increased the budget annually for the PRDoE until 1964, when the percentage of the gross national product spent by Puerto Rico in health and education was the highest in the world. [[Junta de Planificación, Informe económico al gobernador, 1964, pp. 21, 47, and 122.]]

The role of higher education in the modernization period was fundamental. The period saw a dramatic increase in enrollment as well as the creation of new institutions and expansion of the older ones. Enrollment increased 130 percent from 1940 to 1950, 96.3 percent from 1950 to 1960, and 133.7 percent from 1960 to 1970. Before the forties, most higher education was offered at the publicly supported University of Puerto Rico, which had a comprehensive campus in Río Piedras (1903) and a land-grant type College of Agriculture and Mechanical Sciences in Mayaguez on the western part of the island (1911). In 1921, the Polytechnic Institute of Puerto Rico, established by Presbyterian missionaries in 1912 to offer elementary and secondary education in San Germán, a small but historically important western town, began offering undergraduate programs. In 1935, a Catholic elementary and secondary school for girls, dating back to 1880 and eventually known as the *Colegio de las Madres*, became a university college offering the bachelor's degree. In 1948, the Catholic University was established in Ponce, the second most important city in Puerto Rico. In 1949, the Puerto Rico Junior College, the first institution of its kind on the island, opened in Río Piedras. In 1940, the existing private institutions enrolled 8 percent of the total higher education students, and in 1950 they had 9.2 percent, but by 1960 their percentage had grown to 25 percent, and it would continue to grow, as we shall see later.

During the fifties and early sixties, the publicly supported University of Puerto Rico was the major source of trained human resources for the industrialization process, the expanding public schools, the new social and infrastructure programs, the increasing government bureaucracy, and the growing business sector. Many new programs were established, among them the Graduate School of Public Administration in 1945 and the School of Medicine in 1950. Regional two-year colleges were established in Humacao (1962), Cayey (1967), and Arecibo (1967). The UPR was redefined as a system by a new law in 1966, with one of its components being the Regional Colleges Administration to bring together the individual two-year colleges previously established and develop new ones. But with the advent in the seventies of the B.E.O.G., later known as Pell Grants, the private higher education sector exploded, with new institutions, expansion of the older ones, diversity of offerings, and quality of their programs.

One more dimension of Puerto Rican development must be mentioned because of its relation to what was happening in the United States in the early sixties. During the Kennedy years, there existed a very close symbiosis between the

5. George Hanford's first visit to Puerto Rico in 1955 was as a consultant to FOMENTO, the government organism charged with Operation Bootstrap, as to the desirability of establishing an all English-language school for the children of the American entrepreneurs and managers who were coming to the island as part of the industrialization. For his description of this assignment and his anguished doubts about his recommendations, see Hanford, 1991, pp. 140-141.

White House and La Fortaleza. Kennedy personally liked Muñoz Marín and what he was accomplishing in Puerto Rico, and he thought that Latin America needed a major assistance program that would allow for the improvement of social and economic conditions and education that he was seeing in Puerto Rico. As a presidential candidate, and once elected, he sought advice from Muñoz who was already recognized as the leader of the “democratic left” in Central America and the Caribbean. Two close advisers to Muñoz, Teodoro Moscoso and Arturo Morales Carrión, were members of the task force that in 1960 designed the Alliance for Progress. Soon after, the first one was appointed Ambassador to Venezuela and later Director of the Alliance, while the second was appointed Deputy Assistant Secretary of State for Latin America. In 1963, Kennedy awarded Muñoz the Presidential Medal of Freedom.

Since 1949, the United States State Department had sponsored a technical assistance program named Point Four. Muñoz had offered Puerto Rico to both Presidents Truman and Eisenhower as a training ground and provider of technical assistance for Latin America and other underdeveloped nations. Thus by 1959, more than 6,500 trainees had come to Puerto Rico from 118 different countries, over half of them from Latin America. In addition, over 3,600 opinion makers, intellectuals, government officials and professionals came for short visits, specialized courses, and international conferences on development issues sponsored by the U.S. Department of State, the Commonwealth Department of State, and international organizations and private foundations. In addition, many Puerto Ricans went as consultants and lecturers to Latin America. Adolfo Fortier was one of these when he went to Venezuela where Frank Bowles convinced him to work for the College Board. (A. Morales Carrión, *Puerto Rico: A Political and Cultural History*, 1983, pp. 292-303.)

It is evident that the CEEB incursion into international work, especially the decision to develop a SSAT in Puerto Rico (and not at ETS) was founded on a combination of conditions in the United States and in Puerto Rico. Frank Bowles was a witness and a participant in what was going on in Puerto Rico. It is no wonder that he was sure where to base the College Board's first important international program.

5. Access, admissions, and the conditions of higher education in Latin America: The Fortier Study. The increasing flow of secondary education graduates versus slow growth in higher education creates the need to improve admissions. The existing admissions process in most countries is dysfunctional. Ongoing promising changes.

Adolfo Fortier conducted the survey of higher education in Latin America from March to July 1962. In addition to Puerto Rico, he visited 10 countries and met with 167 educational leaders in those countries. The list included many *rectores* (presidents), deans and directors of *servicios escolares* (student services: admissions, testing and guidance) of the major private and public universities. He also met with functionaries at the Ministries of Education and with several directors of secondary schools. In addition, he surveyed numerous documents, reports, and books on the subject.

Fortier's report to the Trustees was delivered in September of the same year. It was titled: “Problems of University Admissions in Latin America,” and the Trustees acted upon it in December 1962.⁶

Secondary education.

The condition of secondary education as Fortier saw it in 1962 can be summarized in medical terms as “critical, prognosis reserved but showing some signs of improving.” Although there were important differences between countries related to size, history, and level of development, there were some important common elements and trends. The curriculum was for the most part, focused on purely academic informational content, which in many countries had remained unchanged for too long. Teaching was essentially transmitting information that the student memorized and that was later tested in oral or written examinations. Although some vocational, industrial, and agricultural secondary schools were beginning to appear, the academic school, whose major if not sole purpose was to prepare a small number of students for higher education, prevailed.

By the early sixties, the CEEB was already a strong and well-recognized national organization whose membership reflected the extraordinary growth of higher education in the United States in the post-WWII era. The Admissions Testing Program, comprising the SAT and the Achievement Tests, were established as the major assessment

6. The report was published in 1963 by the Board: Adolfo Fortier-Ortiz, *Problems of University Admissions in Latin America: A Report to the Trustees of the College Entrance Examination Board*, (CEE: New York, NY., 1963).

instruments to support admissions to college, even if no longer the only ones. In 1957, the American College Testing (ACT) exam had been founded. The number of candidates taking the SAT grew from the original 8,000 of the twenties to 155,000 in 1954-55 and had reached 1,106,000 by 1962-63, while a total of 2,277,439 score reports for SAT and Achievement Tests were sent to colleges and scholarship sponsors. The PSAT (now referred to as the PSAT/NMSQT®) tested 862,000 students, and AP® tested 22,000. Membership now included 543 colleges, 204 secondary schools, and 43 educational associations.

Most countries had a school system consisting of six years elementary plus five years secondary, with a few exceptions that had a six-year secondary, and Brazil, which had a five plus seven system. Some countries divided secondary education in two cycles, but there was no uniform length of the cycles. The first cycle was usually called “secondary,” and the second “*preparatoria*” or *bachillerato*, somewhat similar to the once-used American secondary cycles of junior and senior high school. After successful completion of the second cycle, students received the “*bachillerato*” diploma, which was closer to the European baccalaureate and should not be compared to the U.S. or British “bachelor’s degree.” In Mexico, public and private universities had and still have their own system of *preparatorias*, often requiring an entrance examination. In some countries, the preparatory studies were offered in several knowledge areas, ranging from seven in Uruguay to three in Chile. Typical areas were sciences, humanities or letters, mathematics, and social sciences. The student chose depending on the professional studies he or she wanted to pursue at the university.

Historically, secondary education was controlled by the universities, but this was changing. The national Ministries of Education began aggressively assuming this responsibility once governments began to understand the close relationship between expanding secondary education and economic development. But the influence from the universities was still strong, sometimes directly, as in Mexico, through their own *preparatorias* or high schools, or indirectly through examinations to grant the *baccalaureate* diploma, as was the case in Chile. In any case, the curriculum remained inflexible, prescribed by the Ministry, for both publicly supported and private schools.

Perhaps the most positive development of the period was that secondary education, in general, was growing at a fast rate, pushed by the large expansion occurring in elementary education. In the decade previous to 1962, secondary education had increased substantially in many countries, as high as 160 percent in Costa Rica and 113 percent in Brazil. Many governments were taking steps to reduce the high dropout rate at the end of elementary school and increase secondary school capacity to accommodate more students. These steps were already producing an increase of students seeking entrance to the secondary level. Nevertheless, the fact was that these seemingly large increases were based on a very small population. In 1962, secondary education **was still essentially a privilege of the few**. This is further evidenced by the fact that private schools, many founded by Catholic religious orders, had traditionally played an important role in Latin American education. For the great majority of children, continuing secondary education, if they had managed to stay through elementary school, was an impossible luxury, or at best, an improbable dream. A good part of the increase in secondary education was in the private sector. In Costa Rica, 40 percent of secondary school students attended private schools, 50 percent in Chile, and 85 percent in Colombia. These private schools charged tuition, which meant that they were attended mostly by the children of the landed oligarchy, the professional and business classes and, to a lesser degree, by middle class children who could pay.

Nevertheless, the spread of elementary education, the increase in free public secondary schools and in private secondary schools, compounded by a high rate of population growth “should produce a tremendous flood of students and an intense shortage of facilities for higher education” that are growing at a slower pace. (Fortier, 1962, p.10.) In such a situation, an accurate and objective admissions process was a necessity, something that some countries understood early (i.e., Costa Rica, Chile, and Colombia) and others later (i.e., Mexico, Panamá, and Honduras).

Higher education and the admissions situation.

Higher education in Latin America was organized quite differently from the colleges and universities in the United States. These differences were important to know and understand if the CEEB was to invest in a program such as Bowles envisaged. Fortier’s report first characterized the traditional universities as he found them in 1962 and then described the most important changes that some of the traditional universities were introducing, changes on which he based much of his outlook for the future possibilities of Bowles’s plan.

There were about 125 universities in all of Latin America, of which 100 were public and 25 private. The public institutions were, by law, autonomous, meaning that they governed themselves through the *Consejo Universitario*

(University Council), a body with executive and legislative functions which was elected by faculty, students, and employees. The *rectores* (presidents) were also elected, either directly or by the university council, and had limited authority. This pattern of participatory and elective governance was repeated at the *Facultades* (Faculties, Schools), which had substantial administrative and functional independence because centralized functions and structures were not common. Each Facultad, for example, conducted its own admissions process. The program of studies established by each "Faculty" was for the most part strictly professional, and even the fundamental sciences and academic disciplines were taught as part of the profession. Very often the program of studies of the National University became the required standard for all others. Whatever general or common knowledge and values the student should have was the responsibility of secondary education. The public institutions were free and nonsectarian, and the professors were selected in public competitions. This model of higher education had been influenced by the Napoleonic model during the emergence of the Latin American republics and in the early twentieth century by the Latin American *Reforma de Córdoba*, a reform movement that began in Argentina and whose vision of an autonomous free nonsectarian university with a participatory elective governance structure spread to most countries.

After the 1920s, the historical preeminence of the liberal professions of law, medicine, and the humanities, which attracted the vast majority of students, began to cede a little to the experimental sciences and engineering, and later to business, economics, and the social sciences. It was crucial for these changes to accelerate so that the universities would support economic development. Some educators believed that after 1960 the Latin American universities would undergo a process similar to that which took place in U.S. colleges from 1920 to 1960. Fortier agreed but strongly cautioned that each country would have to find its own way because attempts to transfer the American model to such different environments would probably fail and meet strong resistance from different fronts. Both Bowles and Fortier were in agreement on this and therefore, initially, they talked of providing technical assistance to the Latin American institutions and providing the SSAT for students interested in applying to colleges in the United States, rather than opening up a market for College Board programs.

In the early sixties, higher education was even more of a privilege than secondary education. In spite of important growth averaging 5 percent annually in many countries, there were 2.2 students in higher education per thousand people in Latin America as a whole, contrasted to 15 students per thousand in the United States. The highest participation rate was 7 students per thousand people in Argentina, which was also the rate in Puerto Rico. So, although higher education opportunities were growing, it was at a slower rate than secondary education, so that opportunity for higher education was proportionately diminishing. Many educational leaders and the emerging technocrats were convinced that one of the most pressing public policy goals was to expand higher education. One important obstacle to higher education is that funding is limited because tuition is free. Governments do not provide the needed support. There is a mutual mistrust between the public national universities and the government. The former are often the cradle of leftist opposition.

Very positive efforts in several countries were slowly modifying some of the traditional curricular and administrative structures, adapting some features from the American and other models to their particular conditions. These changes were less difficult for the private institutions because they were not as exposed as the public ones to external and internal political pressures, but change was also taking place in some of the national universities. Centralized functions were being established and strengthened, such as library, registrar, and student services. New horizontal departments responsible for basic subjects began breaking the Professional Faculties' hold over the fundamental disciplines. Some institutions were experimenting with general education core requirements for all students and establishing new academic structures to support core requirements, be it departments, institutes, or even Faculties. Although Fortier does not mention it, this particular curricular innovation was strongly influenced by the ideas of the Spanish philosopher José Ortega y Gasset in his book *Mission of the University*, which had been implemented in the forties at the University of Puerto Rico. As a matter of fact, an intense exchange of ideas and persons took place between the Faculty of General Studies at the University of Puerto Rico and Central American institutions during the fifties and sixties. Other changes had to do with establishing stronger academic standards, such as requiring class attendance, adequate academic progress, dismissal of students for poor academic performance, written course examinations, more full-time professors, and reforming the admissions process introducing entrance examinations.

Change was not coming equally in all countries, but the smaller Central American countries were working in collaboration to bring about many of these changes in their universities. Colombia, Chile, and Brazil were also on the move, with Mexico and Argentina maintaining a slower pace. Some of these changes were being supported by the Ford Foundation and the Organization of American States, but Fortier stressed the need for more technical assistance from the United States, particularly through specific universities and educational organizations, such as the CEEB.

From Fortier's report and other sources, one can conclude that transition to higher education in most Latin American countries was dysfunctional. The prevailing ideology, often validated by law, called for open and free admissions to publicly supported institutions, with no other criteria than having completed the *bachillerato*, and presenting a medical health certificate. School records were not normally used because in many places they were not available on time for the admissions process and if available, they were not deemed reliable. There was general distrust in the grading system which was seen as lacking consistency and being too lenient. Because of the requirement to have the baccalaureate certificate before applying to the university, the admissions process was conducted in the few months between graduation and the beginning of classes at the university. However, in many countries students graduating from the university's preparatory school were admitted with no further requirement.

But ideology aside, the reality of more students demanding access and the limited supply of places at the universities forced the institutions to establish entrance requirements and selection mechanisms. The students in many countries had to pass achievement exams specific to each Faculty or professional school, and very often were required to take and pass additional courses of from three months' to a full year's duration. There were different combinations of exams, remedial courses, retesting, and introductory courses. Also, commercial and official test preparation was offered. Many educators called this situation a "hidden educational system." For the most part, each Faculty established entrance requirements, designed exams and remedial courses, very often changing them from year to year. There were no uniform standards and very little systematic validation of the exams and entrance requirements.

An extreme example of the above was Chile, where a student in his last year of *bachillerato* must pass the final course exams, then pass the five-day *bachillerato* exams, which is prepared and administered by the National University, and then he must pass the entrance examinations for the Faculty of his choice. All of this, within approximately one month. Two negative consequences of this system are that secondary education emphasizes the same factual knowledge that the exams stress, and there are many preparation courses on the market.

Another important dysfunction was the large number of students applying for a small number of traditional professions, creating pressure in these Faculties, resulting in poor and overcrowded facilities. For example, in Argentina during the Peronist regime in the early fifties, universities' enrollment rose astronomically. At the University of Buenos Aires, the School of Medicine one year had an entering class of 4,160! In 1958, entrance examinations were introduced in many Faculties, most of these were achievement exams to evaluate knowledge acquired. But many students failed the exams, and many (often 50 percent) of those admitted failed during the first year. This situation led to the establishment of entrance courses. By 1960, 3,000 students took the six-month entrance course offered by the School of Medicine, and 650 were admitted. Another solution to the dysfunctional transition was the establishment of one-year programs of preuniversity studies by the different Faculties. A Preuniversity Department was established to conduct this experiment. Reports indicate that the students were less resistant because they made up deficiencies and acquired a common core of knowledge; students not really interested or inclined to study in the given Faculty dropped out early, and freshman retention improved.

Costa Rica presented a better picture, as a more comprehensive reform of admissions and transition was in progress at the national university, which included admissions to the university as a whole and not to a specific Faculty; a four-hour achievement entrance examination based on the secondary school curriculum, prepared by a committee of secondary and university staff, and coordinated by a center for psychological research that was unique in Latin America; an ordered transition process from secondary education to the university through a well-organized one-year program of general studies; and intelligent use of modern administrative concepts and techniques. Many officials in the country expressed interest in experimenting with a Spanish version of the SAT. Fortier adds in his report that the University of Costa Rica was a leader in the Council of Central American Universities, an association promoting reform, common standards, and understanding among institutions in the region, and which is particularly interested in improving selection and measurement.

In Mexico, important changes in the admissions process were also in progress at the major public institution, the *Universidad Nacional Autónoma de México* in Mexico City. Stricter entrance requirements were being defined: a minimum grade of 7, on a scale of 1 to 10 where 6 was the passing grade, was required, and in 1961 they introduced a series of vocational and achievement tests, initially for guidance and remedial purposes. However, by 1962, a selection process was adopted for the first time in its history, using multiple criteria and instruments such as scores on an achievement test based on preparatory subjects, and a Spanish adaptation of the Raven intelligence tests, the general grade average in preparatory school; a corrected average including only academic subjects; a variable confidential weighting of the schools as classified by the university; and a vocational interest test for guidance purposes. The

admissions process was centralized at the General Division of Academic Services, and the tests were prepared by the Department of Psychological Services. But each Faculty retained the authority to set its standard for each of the criteria. In spite of student resistance, “the principle of selection has been established, university authorities believe.” But this national institution did not appear to be interested in College Board programs.

Another Mexican institution presented a more open attitude and was later to become very important for the Puerto Rico Office of the College Board: the Monterrey Technological Institute. This institution was unique in Latin America in that it had adopted administrative and academic norms and procedures typical of American higher education. Privately controlled, charging a high tuition by Mexican standards, it had introduced the concept of semester hours, frequent course exams, obligatory class attendance, a minimum grade average for retention, and more full-time faculty than was average for Mexico and Latin America, and common courses within each Faculty prior to specialization. In other areas it followed the Mexican tradition: Upon graduation students from their own preparatory school had automatic admission to the Faculties; there was no general entrance examination, and only two Faculties, science and engineering, had an achievement admissions test; students not admitted could take a remedial one-semester course, after which they were normally admitted. They had recently introduced vocational and intelligence tests as well as personality inventories. The authorities of the Institute were interested in exploring new selection methods as they were expecting a substantial increase in applicants by 1967. This interest was to grow into an important relationship between the Institute and the College Board that will be explained later.

In Colombia, there was a strong association of universities collaborating in strengthening the admissions process and defining standards for its 26 member institutions. They were using essay-type achievement tests as well as intelligence and personality tests for guidance and admissions; they gave some weight to grade point average; and they were actively sponsoring professional conferences on issues of admissions and guidance for the whole country. During its first years, the CBPRO offered technical assistance to the association and cosponsored activities with them. Two private institutions, the Jesuit Order’s Universidad Javeriana in Bogotá and the Universidad de los Andes, were experimenting with differential aptitude testing and establishing well-defined standards for admissions.

In Guatemala, at the only public university, Universidad de San Carlos, there was no general admissions tests, but specific Faculties used achievement tests, as well as personality and vocational inventories, thus accumulating experience with testing. It was felt that soon the university would have to establish admissions testing to handle the increase of applicants and limited space.

After surveying the condition of transition from secondary school to higher education and the problems related to selection and admissions, Fortier was convinced that there was an important role that the CEEB could play in support of Latin American higher education. This role was consonant with the official U.S. government position to support improving social, economic, and political conditions in underdeveloped countries. Education was a necessary condition for progress in these areas to occur. He knew that transition was becoming more and more problematic and that several countries and/or institutions were experimenting with different approaches to improve the overall situation, and results of these experiments were not really encouraging, at least from a “state-of-the-art” perspective.

In Fortier’s opinion, the existing methods were not settled and were open to change. The prevailing method of selection using essay-type subject achievement exams was not adequate to the situation and would eventually create more problems for the institutions. With a few exceptions, the examinations were not developed systematically; their content and scoring criteria varied from year to year; often there was no concurrence with what the students were actually taught or what was reasonable to expect the students to remember. The tests had too much emphasis on memorized information, and there was no objective statistically based validation process. The idea of introductory courses to facilitate transition was often poorly implemented and lacked a reasonable foundation to integrate the courses effectively with the students’ intellectual and social development. Only the experiments with general studies programs met this requirement. Little attention was given in the entrance examinations to abilities needed for success.

But faced with a larger pool of applicants and high freshman attrition rates, universities would continue to establish new and not validated requirements, which would leave many really qualified students out. These practices were sure to cause social resentment. In an unusual and infrequent statement, Fortier gives a very harsh assessment of the situation:

The arbitrary elimination of prospective candidates through severe grading of invalid examinations should be stopped as quickly as possible. Every effort should be made to improve the technical quality and empirical validity of selection and entrance procedures, so that the whole process of admissions will become less arbitrary and more uniform and fair. (Fortier, 1963, Page 24)

His conversations with important leaders led him to believe that they were open to consider technical aid from the CEEB. But Fortier felt that the need for technical help went beyond the transition and admissions issues to areas such as institutional planning, financial administration, academic personnel management, scholarship administration, curriculum supervision, student personnel administration, and other management functions. However, since these areas were not part of the CEEB's expertise, he thought the Board could act as a broker to put Latin American institutions and leaders in contact with institutions and persons in the United States with expertise and experience in these areas.

As to the direct support that the CEEB could provide, the overall goal would be to assist interested countries and/or specific institutions to develop efficient and just systems to achieve a more fluid movement of students from secondary school to higher education. Helping interested countries and/or specific institutions to develop better admissions policies and practices was needed even more than knowledge of test construction and administration. He envisioned the CEEB providing technical assistance, consultation and training, as well as offering technical services related to testing and the evaluation of students applying for higher education. Fortier suggested several types of activities that the CEEB could engage in to achieve the stated goal: sponsorship and participation in educational meetings to strengthen communication between educators from the United States and Latin America; technical workshops, training institutes, advisory assistance to specific institutions and countries at their request, and a periodic publication in Spanish with articles on admissions and related issues. He had encountered much openness to know more about higher education practices in the United States and strongly believed that increased two-way communication would be beneficial, particularly as more students from the region were going to the States.

Fortier then explained his views on the issue of a Spanish SAT. He felt that this could be a great contribution but warned that it was "a most difficult and intricate enterprise." Aptitude testing and the related psychometric research were largely unknown in Latin America, although he had found considerable experience with differential aptitude and other psychological tests. As he had reported, some institutions were using these for guidance and even admissions.

He reported that some institutions were willing to collaborate in the experimental administration of a SSAT. He then anticipated some of the technical issues that could come up in such an endeavor, such as using one or several versions of the test across different countries. His preliminary suggestion was that piloting should be done country by country, and then, "as the experiment developed, country by country comparisons would be possible through meaningful norms and standardization developed in individual countries." He closed his discussion of the SSAT by stating that he could think of a thousand difficulties, in spite of which the experiment should be conducted. (Fortier, 1963, Page 26).

If development of a Spanish Scholastic Aptitude Test for use in Latin America presented many difficulties and uncertainties, the situation in Puerto Rico was totally different. The higher education system had developed after the island became a U.S. territory, and it was similar to the American system in governance structure, academic organization, Faculty norms, and centralized management functions. All of the existing five institutions were already accredited by the Middle States Association of Colleges and Secondary Schools. The Polytechnic Institute, later Inter American University, was the first Spanish-speaking institution to be so accredited. All five institutions were using some kind of admissions or placement test and had defined admissions criteria. One of them, the College of the Sacred Heart, a small liberal arts college for women, had used the SAT as early as 1951 and was a College Board member. It should be observed that the SAT was being administered in Puerto Rico for students applying to colleges on the U.S. mainland, at least since 1951, and by 1962 it was administered in centers in San Juan, Ponce, and Mayaguez. The other institutions used general achievement-type tests. In 1961-62, the University of Puerto Rico had the largest entering class, about 3,500, and close to 11,000 applicants took its examination. Its test was updated in 1961-62 and included five separate parts: Spanish, English, math, reasoning, and general information. It was charging \$10 for the test, which was administered throughout the island's high schools during several weeks. The Catholic University in Ponce was also charging \$10.

In 1961-62, about 9,500 different students took admissions exams in Puerto Rico distributed among the five institutions and this number was expected to rise annually at least by 10 percent. Most important, there was agreement

that the administration of separate admissions exams was cumbersome and costly, and that the existing tests should be improved. This was clearly expressed in 1960, at the Annual Conference on Educational Guidance, which took place at the Catholic University in Ponce, where a recommendation was approved in favor of a common scholastic aptitude test for all the institutions. Undoubtedly Chancellor Benítez had done the consensus building that Bowles was hoping for.

The willingness of the Puerto Rican institutions to participate in the experiment meant that the island would provide an initial pool of candidates for pretesting and later to take the SSAT regularly, with a good possibility of becoming self-sustaining. Furthermore, all indicators suggested that the initial pool would increase annually as the higher education institutions expanded to accommodate the growing number of high school graduates. But there were several other reasons that made Puerto Rico the best location to develop the test and to be the base for Latin American activities. By language and culture it was indeed much closer to Latin America and it had political stability, a rapidly developing economy and a modern education system. It had a growing pool of bilingual specialists in education, psychology, testing, and statistics, who had received their graduate education in some of the best universities on the mainland. Teachers and students were more or less familiar with some form of multiple-choice testing.

In addition, as has been previously explained, Puerto Rico was very active in providing technical aid to Latin American countries in areas such as planning, public administration, cooperatives, expansion of education, and there was already an intense two-way traffic of technicians and bureaucrats. So that it would be a natural progression for a College Board office based in Puerto Rico to be the center for providing consultation services, training, and technical aid on access, admissions, testing, and higher education management.

Consequently, Fortier recommended to the Trustees that an office be established in Puerto Rico, with local staff, to develop and administer the SSAT for the island's institutions and explore its possible use in Latin America. This office would be the base for developing the other services for which there was an established need.

B. The CEEB Trustees authorize an experimental office in Puerto Rico (1962) to develop a Spanish version of the SAT and offer technical consultation services to Latin America.

1. The PRO is founded. The first plan and budget. The rationale, purpose, and organization. The recognition of linguistic and cultural differences under the American flag. The international dimension. Significance of the Trustees' action.

Fortier's report was presented in September 1962, and in December, the Trustees authorized establishing an experimental operation in Puerto Rico. Ten months later, in October 1963, at the CEEB Annual Meeting in Chicago, in what was his last speech as president, Frank Bowles disclosed that his proposal had:

...encountered substantial opposition from the Trustees on the element of risk, and some objections from within Educational Testing Service, which was working with some Latin American tests specialists. The fact that the program had been brought into being represented, therefore, a substantial victory. (Bowles, 1967, Page 319)

Bowles and Pearson had approached ETS for the possibility of a joint venture, but ETS did not accept. The actual proposal to the Trustees was submitted as an addendum to Fortier's report, prepared by Richard Pearson, executive vice president, which included a three-year budget and work plan. The Board's senior officers recommended "that the Trustees authorize the president to establish, on a three-year trial basis, a College Board office in Puerto Rico, and that a sum not to exceed \$125,000 be provided for the direct underwriting of the office's operation during this period." (Pearson, *Plans and Budget...*, 1962, Page 3) The resolution was approved with one abstention.

The plan for 1963-64 through 1965-66, established two major objectives: the development and administration of the SSAT in Puerto Rico, and the offering of consultation services on admissions in Latin America. The SSAT would be developed by a committee of examiners from Puerto Rican institutions and two or three qualified people from Latin America, with the technical support of ETS and the College Board's regular committee for the SAT. All work was to be conducted according to the Board's practices in the United States by the staff in Puerto Rico, "under only general supervision and liaison with the ETS office in Princeton." (Actually, the initial scoring and statistical analyses for the tests were conducted at ETS until the mid-seventies.) The budget provided for a small full-time staff of five and the hiring of temporary professional and clerical help for part of the work as needed.

The financial plan contemplated testing 8,500 to 9,500 students at a test fee of \$10. Because of the limited size of the candidate group, the fee would not cover all expenses, and the Board assumed a total deficit of \$90,000 for the three-year period to be covered from the Board's general fund. In anticipation of contingencies, an upper limit of \$125,000 was set. Any expenses related to consultation services, except for the director's and the professional associate's time, would have to be paid by the institutions receiving the services and/or through external funding. Only marginal income was budgeted from consultation services. But the deficit was expected to diminish annually until the operation became self-sufficient. The assumptions and conditions contained in this first budget and plan remained as constants during the six years that we have called the foundation years and beyond. During this time there was extreme austerity in spending; reliance on a small, efficient, hard-working staff to do all test development work as well as registration, administration, scoring and reporting; the marginal income expected from consultation activities in Latin America, the limited population base, the need to keep test fees low in tune with the limited income of students' families; the initial relationship with ETS, the need to rent computing services, the ever-present risk of running into deficit and the Trustees' continuous pressure to avoid it.

Writing in 1964 on the significance of this action, one of the senior officers, Vice President John M. Duggan, explained the reasons for engaging in this extraordinary experiment. The first reason was in many ways a bold statement on testing philosophy, and one wonders if he was aware of its full implications. Duggan said that the first language of Puerto Rico's population of mostly U.S. citizens was Spanish, and that this linguistic fact made the regular College Board offerings in English "not appropriate" for use on the island. We shall see that later on, during George Hanford's presidency, the full implications of testing Spanish-speaking citizens with a test in English was discussed as it applied to Hispanics on the mainland. The issue later disappeared until it was brought back again in the early 2000s by myself and Senior Vice President Peter Negroni.

The second reason offered by Duggan reflected the international assistance mission that the country was undertaking in the Kennedy years and which both Frank Bowles and Fortier defended. The activities in which the CBPRO was already engaging in Latin America allowed the Board to share its experience in admissions practices, testing, and the application of research to related problems and practices with institutions in the region. It is significant that he felt that if the experiment was successful "there may well be others."

And third, if College Board testing in Spanish achieved enough acceptance in Latin America, then the admission of students coming to the States would be improved with better information on the students' aptitudes. Again, Duggan was reaffirming the sound testing principle that the most accurate measurement of abilities and knowledge is achieved when the student is tested in his native language.

**2. Transfer of the SAT admissions testing model to a Hispanic linguistic and cultural environment:
Developing the Spanish SAT. An international test committee is appointed (April 1963). From
specifications to item writing to pretesting in Puerto Rico and Latin America in record time.
The first operational administration for admissions to colleges in Puerto Rico (February 1964).
Positive reaction from the higher education community.**

On January 1, 1963, Adolfo Fortier was appointed director of the College Board's Puerto Rico Office (CBPRO). In February, Dr. Jorge Dieppa, a psychologist from the School of Education at the University of Puerto Rico, was appointed professional associate. An office manager and two secretaries completed the regular full-time staff. Part-time seasonal help would be brought in as needed. The CBPRO was officially opened on April 15, in rented space in Hato Rey. The office was furnished with government-style desks, chairs, and bookcases built by prisoners at the Puerto Rico State Penitentiary. This furniture was known to be sturdy and inexpensive.

Work on the SSAT⁷ began immediately with the appointment and first meeting of the committee of examiners the following day. During the first week, Bowles and Fortier met with the chief executive officers of the Puerto Rican institutions and the Commonwealth Secretary of Education to explain the work plan and to reinforce their commitment to the project. Indeed, the institutions reaffirmed their collaboration and their decision to require the entrance examination from all students. But much to Bowles's and Fortier's surprise, they were presented with an unexpected petition. In addition to the SSAT, they wanted a test of English as a Second Language. Their argument

⁷ During the early years, the test was identified in most official College Board documents in English as the SSAT. But later it became common, even in official documents in English, to call it by its Spanish name: *Prueba de Aptitud Académica* or PAA*, a direct translation of the English Scholastic Aptitude Test.

was that many textbooks used in college courses were in English because there were few modern textbooks in Spanish, particularly in the areas of business administration and the sciences. But, although not found in the documents, there must have been another reason: Due to the political relationship with the United States, English was an important element of a professional education in Puerto Rico. The College Board leaders certainly understood the reasons behind the petition, but they knew that developing another test would put stress on the staff and on the budget. Nevertheless, they gallantly accepted the additional task and, soon after, a committee of examiners for the English Test was appointed and immediately began working.

The first SSAT Committee, whose charge was overseeing the development and implementation of the aptitude test, consisted of seven members: three from Puerto Rico, three from Latin America, and one from the United States. The three Puerto Rican members were Dr. Augusto Bobonis, dean of education at the University of Puerto Rico, who chaired the committee; Father Edmund Baumeister, professor of education at the Catholic University; and Professor Mario Anglada, director of the curriculum division at the Puerto Rico Department of Education. The Latin American members were Dr. Erika Grassau, director of the Institute of Statistical Studies at the University of Chile; Father César Jaramillo, S.J., dean of students, School of Medicine, Universidad Javeriana de Colombia; and Dr. Gonzalo Adis Castro, director of educational research at the University of Costa Rica. The U.S. member was Dr. Julian Stanley, professor of educational psychology at the University of Wisconsin and a member of the SAT Committee. Two ETS consultants participated in the developmental phase: Dr. William Coffman and Dr. Sheldon Myers. In terms of institutional affiliation, it was a balanced committee having members from public and private institutions and the K-12 public school system. Its international composition was solid with five countries represented, including the United States. In terms of academic disciplines the following were represented: statistics, mathematics, psychology, social science, humanities/philosophy, and education. The three Latin American members had been interviewed by Fortier for his study and one of them, Erica Grassau, was a coinvestigator in the International Study directed by Bowles and had also conducted a study on the use of objective tests in Latin America. It is strange that no specialist in Spanish language, as such, was appointed.

The committee met for the first time from April 15 to 25. During those 10 intensive days, basic agreements were reached as to the concept of the test, its contents, and psychometric specifications. These were revised in a meeting on October 14, held at the CEEB offices in New York City. A preliminary general policy statement was approved.

This document expresses the agreements reached by the SSAT Committee and the College Board staff and ETS advisers. This was the first time that the Board sponsored an admissions testing program not addressed to mainland U.S. students in a language other than English. In spite of the fact that the SAT had already been in use for over 35 years and that it had considerable supporting research validating its use, the committee did not assume that it would work well in a different language and a different cultural setting. Consequently, they decided not to translate specifications and items from the SAT but to write everything from scratch, although keeping close to the SAT concept. But the goal was to maintain parallelism between the SAT and the SSAT, and this was an unprecedented technical challenge for all. Translation and adaptation of tests from one language to another had been made many times, but to develop a parallel test without translation and adaptation was rather new.

Several measures were taken to deal with this situation. The same test development model used successfully for many years in the United States, which called for an active interaction between educators and users on one hand, and psychometricians and professional test developers on the other, was maintained. Another aspect of the model was the definition of the experimental scientific methodology, which required statistical analyses and empirical evidence. This methodology required pretesting the items with sample populations, conducting complete statistical analyses of the items pretested, repeating the item analysis after the operational administration, and conducting validity studies. As part of this experimental approach, the committee explained to users that a final set of the test specifications would take several years. As we have seen from Fortier's report, this methodology for test development was not regularly used in Latin America, and the existing tests previously developed in Puerto Rico used this methodology only partially.

The committee also maintained the SAT's emphasis on assessing reasoning abilities rather than memorized information, which diverged from the traditional entrance examinations in Latin America and even in Puerto Rico. Another important element in the SAT model that was maintained by the committee was related to the role of the test scores in the admissions process, described as providing some but not all of the information for the admissions decision. Again, the role of entrance tests in Latin America was much stronger, as it often was the only or the major source for the admissions decision. The committee described the test as:

*An instrument for **obtaining additional information** to help in the selection for admissions to colleges and universities of **desirable candidates whose vernacular is the Spanish language**. The desirable candidate is defined as a student who can: 1) **think independently**; 2) **assume a critical attitude**; and 3) **use knowledge and the tools of learning in new problem-solving situations**. This definition is accepted as a working instrument, while it is expected that a final definition will evolve as the Committee's experience with the tests develops. (Committee of Examiners SSAT, 1963, Page 1).*

The use of the multiple-choice items, which was one of the defining characteristics of the SAT, presented a problem. Latin American students were not familiar enough with the format, and Puerto Rican multiple-choice test items were not strong in measuring thinking skills. The question was: Would this interfere with a reliable assessment? After researching the issue, it was proposed that the students would be able to handle the item format if clear explanations and examples were given. Pretesting and posttesting analyses confirmed that this was the case in Puerto Rico and in Chile, Costa Rica, and Colombia, the four sites where pretesting was conducted in 1963. Anyway, the students had been allowed more time per item than was usual on the SAT, but it was found not to be necessary. Therefore, in the second form assembled, the number of items was increased.⁸

Another difficulty was the possible effect of linguistic variations from country to country. The presence of committee members from four countries helped solve this issue. The consensus was that the differences were mostly in spoken language and that as the students move through the secondary school a more common academic Spanish became the norm. The language used throughout the exam would be consonant with this norm. Pretesting in the four countries showed that this was for the most part true, although in Chile and Colombia, additional explanations concerning the analogies format were given. Determining the test content specifications also presented difficulties since the secondary school curricula was not the same across countries and across types of schools. Even though the test was an aptitude test and was not intended to measure specific content achievement, abilities do not develop in the abstract, so a minimum common set of content specifications was important. Again, the International Committee agreed that it could be reasonably assumed that the students in all countries had taken the following basic courses:

From seventh grade on, have taken three years of general science courses and one year of biology, three years of social studies, one year of general history, and five years of Spanish... and four years of mathematics, including elementary algebra and intuitive geometry. (Committee of Examiners SSAT, 1963 pp. 2-3, and, Dieppa, 1964, Page 7.)

The test specifications determined by the committee called for a total of 145 minutes of actual testing time plus a five-minute rest period. The verbal section was assigned 50 minutes for 65 items; the mathematical section was given 70 minutes for 45 items; and the experimental section for pretesting and equating was assigned 25 minutes for 20–35 items.

3. Development of an English achievement test (ESLAT) to join the SSAT.

But as we know, this was no longer a project to develop an aptitude test; after April 15, it included developing an English test. Consequently, a committee of examiners was soon appointed and met to determine the test specifications. This was a strictly local committee because the test was not intended for use in Latin America, at least initially. The first English Achievement Committee had seven members, five taught English at one of the five existing colleges and universities, and the other two were General Supervisors of English and Evaluation, respectively, at the PRDoE.⁹

8. For a complete description of the development process and statistical summaries of the pretest and initial operational administration, see Dieppa, 1964. The original statistical summaries of all pretest and operational administrations conducted during the initial development of the SSAT in Latin America and in Puerto Rico, as well as the validity studies, are kept at the PRLAO.

9. The English Committee members were: Prof. Robert Muckley, Inter American University; Dr. Ralph B. Long, University of Puerto Rico; Sister Margaret Immaculate, C.S.J., Catholic University; Professor Rosario Biascochea, College of the Sacred Heart; Dr. Estela Agramonte, Puerto Rico Junior College; Dr. Adrian Hall, PRDoE; and Dr. Charles O. Hamill, PRDoE.

In their first two meetings, the committee discussed the nature, purpose, and the specifications of the proposed test. They agreed that it could not be a measure of skills in the English language reasonable for an English-speaking student. Rather, it should provide information on how much English the Puerto Rican student, whose vernacular is Spanish, knows when entering college on the island. The justification given was that “the English language is considered a skill necessary for the understanding of college instruction and textbooks, and therefore the Puerto Rican student cannot be expected to know English as well as a native speaker of English.” (Committee of Examiners ESLAT, 1963 Page 1, #1)

The issue of the language of the test instructions, Spanish or English, was discussed, but no agreement was reached, so it was left for after the committee was able to see the items submitted by the item writers. Finally, it was decided to write the instructions in Spanish and the name of the test was established as English as a Second Language Test or ESLAT.

The test specifications were established as well as the time/item distribution. There would be 65 items for 45 minutes of testing. There would be two major parts: I. Syntax and Morphology would have 45 items and 30 minutes, and II. Reading Comprehension would have three passages of 200 words, 15 items in 15 minutes.

Because of the tight schedule, item writing began almost simultaneously with the work of the two committees of examiners. Nineteen high school teachers and college professors were trained by Jorge Dieppa and the two ETS consultants. The SSAT group produced about 700 verbal and mathematical items, of which 312 were accepted for pretesting. The English item writers produced about 500 items, of which 156 were accepted for pretesting. These items were assembled in three experimental forms. The aptitude forms were administered in August 1963 to 2,447 freshman students during orientation week at the three largest Puerto Rican universities, and 1,300 high school seniors in Colombia, 1,202 in Chile, and 1,142 in Costa Rica. The ESLAT experimental forms were administered to 1,386 college freshmen at three campuses of the University of Puerto Rico.

The results of the experimental administrations for both tests were very encouraging. Item analyses showed that there were enough items to include in the operational version scheduled to be administered in February 1964. But a system of continual production of items was established to be pretested in the experimental section of each operational test beginning in February. This way no more separate pretesting would be needed to assemble the new forms every year.

4. The first operational administration for admission to colleges in Puerto Rico. (February 1964).

As charged, the Puerto Rico Office had to conduct not only the test development work which we have described in some detail, but also the registration of candidates and the organization of the test administration process, and eventually the scoring, reporting, and the supporting research. In this sense, it was a unique office within the organization, recalling the original CEEB before the founding of ETS. Registration for the tests was conducted with support of public and the private schools. Participation of senior and middle management at the PRDoE and of college admissions staff was crucial for this process and for actual administration of the tests. Registration forms and information booklets were designed and distributed through the counselors in all public and private high schools. The schools were responsible for collecting the completed forms and a \$9 money order and sending the forms directly to the College Board office. Many applicants brought the materials themselves, and they still do. The budget called for a fee not exceeding \$10 for the SSAT and advised that it should be as low as possible, but the fee was actually set at \$9 for the SSAT and the ESLAT. I have found no explanation for this decision, which must have increased the budgeted deficit. But I strongly believe that the presidents and the secretary of education brought up the issue with Bowles and Fortier. In 1964, a \$10 fee was a heavy burden for many of the students applying to college in Puerto Rico, even if both UPR and Catholic University had established that fee for the test and application.

The administration of the SSAT and ESLAT was conducted in 53 test centers distributed throughout the island, including one group of 20 students examined in the offshore island of Vieques. Manuals for the proctors and supervisors were prepared, following similar

Planning notwithstanding, contingencies occur. When the first shipment of tests arrived, Fortier had arranged with a one-person delivery service to pick it up, and he himself accompanied the driver in an old panel delivery truck. When they arrived at the office and began carrying out the boxes, they noticed one of the back doors was not securely locked or had unlocked itself over the road bumps. In panic, they immediately counted the boxes and, yes, there was one missing! Before he had time to fully react to the situation, a taxi drove in, and the driver came to him with the missing box, explaining he saw it fall off the truck. He had tried unsuccessfully to gain the attention of the truck driver and decided to follow him to his destination. Recounting this experience over a glass of wine many years after, Fortier was convinced that he had a guardian angel looking over him.

manuals used for the SAT. Eight hundred supervisors and proctors were trained, all of them high school staff. One examiner and one proctor were assigned to each room, with approximately 35 students per room. Each test center was assigned a director, usually the school principal or headmaster, with an additional assistant director for large centers. The island was divided into 13 zones, taking into consideration geographical proximity of the test centers, and a zone supervisor was assigned to each. They would deliver and collect the exam booklets for the test center in their assigned zone, most of them using their personal vehicles. These zone supervisors came from the district superintendent's office or the central administration. The dedication of the more than 1,000 teachers, counselors, principals, and supervisors, who worked with only a nominal retribution on the different aspects of the process, was quite beyond the ordinary. This dedication has been constant until today and explains in part the success of the PRO. William B. Bretnall, director of College Board test administration at ETS, had this to say about this first administration in which he acted as an observant supporter, "It was the smoothest program of any that I have seen in nearly 20 years of work in test administration....there were no mistimings or missing test books, ...the tests were delivered, administered, and returned to the College Board office within a period of about 36 hours" (Bretnall, 1964, Page 11). The tests were printed in Pennsylvania so they were scheduled to arrive in San Juan by air cargo, with sufficient time left for reprinting if they did not make it safely. For the same reason, just in case the answer sheets were lost on their way to Princeton where they would be scored, they were microfilmed in San Juan.

5. The impact of the CB admissions testing program in Puerto Rico: The systematization of access, selection, and admissions. The collaboration of secondary and higher education. The beginnings of a statistical bank on transition.

On Saturday, February 15, exactly 10 months after the PRO was founded, the first administration of the SSAT and ESLAT was conducted. A total of 11,545 students were tested in 53 test centers, including two special centers for Seventh Day Adventists who were tested on Sunday, February 16. The six local institutions received the score reports in March. These were UPR, Sacred Heart, Catholic University, Inter American University, Puerto Rico Junior College, and the recently founded (1961) Antillean College, a Seventh Day Adventist Church institution. A second administration was held on June 20, 1964, with 783 students. In 1964, the colleges and universities in Puerto Rico were able to conduct their admissions process much earlier than ever before. The high school seniors took only one entrance examination, saving time and money, and were able to complete their college application and know where they would be studying before finishing their senior year. The placement of admitted students in different levels of freshman English was made before they arrived for their first class based on the ESLAT scores. This was just the beginning, because within three years, achievement tests in Spanish and mathematics would be added to the admissions testing program, and the year after that, the Advanced Level Program was initiated. Transition from high school to college in Puerto Rico had been fundamentally changed!

But there were other important dimensions of the establishment of the CBPRO and the development of the SSAT, or *Prueba de Aptitud Académica*, and ESLAT. The full backing of the higher education institutions and the Puerto Rico Department of Education in all stages of the project, from test development to administration, presented a not common opportunity for collaboration between two systems that too often were at odds with each other. The project enabled them to sit around the same table and work together. This collaboration has been a constant throughout the history of the office to this day. The participation of schoolteachers and college faculty in developing test specifications, item writing, editing, and test administration, guaranteed that the tests would be sensitive to the local educational situation. And because it required intensive training, the knowledge base and practical know-how on test construction and educational evaluation in both systems was strengthened substantially. This training intensified in the following years and became a permanent activity. Finally, Puerto Rico had, for the first time in its history, a source of comparable educational information about students moving into college because all entering students had been measured by the same set of instruments. This opened up many possibilities for educational research.

In a paper presented at a precollege counseling seminar in April 1965, the then director of admissions and guidance at the flagship University of Puerto Rico campus in Rio Piedras summed it all up in these words: "Personally I think that the College Board test represents a step forward in our admissions system. Not only for its characteristics and construction, but also because it will make possible more complete evaluations, studies, and analyses than what we have been able to conduct individually in our colleges and universities. (Rivera-Medina, 1965, Page 10).

Another important consequence of the initial administrations of the PAA and ESLAT was that the Puerto Rican higher education institutions could become members of the College Board association, and they did in 1965-66. Of the five original institutions, only the small College of the Sacred Heart had been a member prior to this date. The

University of Puerto Rico, the Inter American University of Puerto Rico, the Catholic University of Puerto Rico, and the Puerto Rico Junior College sent delegates for the first time to the Annual Meeting in New York City, October 25-26, 1966, and at this meeting the PRDoE became a member representing the island's public schools. Membership meant access to publications and meetings where issues of admissions, guidance and counseling, and preparation for college were discussed.

As we already know, Frank Bowles resigned as president of the College Board and went to the Ford Foundation in 1964. In his last speech to the members, already cited, Bowles made a proud statement about what had been achieved in Puerto Rico:

If I sound as though I am speaking with pride, it is because I am. I consider it a remarkable accomplishment (1) to construct and be ready to administer a professional-quality test within less than a year, even granting the existence of the SAT as a model, (2) to bring the institutions in Puerto Rico to immediate common use of the test, (3) to give American admission officers a firm testing instrument for use in dealing with Spanish-speaking students, and (4) to accomplish this within a modest budget, without foundation aid, and with every prospect that the undertaking will be immediately self-supporting. Particular congratulations go to our two staff members in Puerto Rico for this achievement. (Bowles, 1967, P. 323.)

Perhaps this euphoric view was too optimistic concerning the use of the SSAT for admission of Spanish-speaking students to American colleges, and he overestimated the probability of the PRO soon becoming self-sufficient. But the essence of his message was right. It was indeed a remarkable achievement!

After Bowles left, Al Sims, who joined the College Board staff about 1962, assumed the leadership for the College Board in the international outreach begun by Bowles and continued his sensitive oversight of the PRO as a senior officer until his retirement in 1980.

C. The Beginnings of the CEEB's Latin American Activities.

As for my personal opinion, I do believe that the Board's experiment in Puerto Rico has already proved in part that it could become an effective link between the educational communities in both Americas. I also believe that education is the most important avenue through which technical assistance can be provided to the whole of Latin America. But at the same time, we should realize that educational developments must always be designed to cope with the unique and special problems existing in each particular country.

Adolfo Fortier, 1964

1. The rationale: possible use of the SSAT for admission of Spanish-speaking candidates to U.S. colleges; technical assistance: knowledge transfer and limited use of the PRO tests to improve admissions process in Latin America.

During these first years, Fortier expressed several times and in different ways and places the principles that guided the CBPRO's work in Latin America. First was the possible use of the SSAT to facilitate the evaluation of Latin Americans interested in attending college in the States. This was rooted in Bowles's ideas concerning the importance of the United States becoming a leader in facilitating the movement of students across countries. Sometimes, Fortier would speak of "Latin Americans," which was more limited, and other times he would talk of "Spanish-speaking," which is broader and would include Puerto Ricans and what today are called Latinos on the mainland, an issue that we shall consider later. The second principle was the importance of providing technical assistance to and through the educational systems in the region. As in the United States and Puerto Rico, education was the major force for social and personal development. The third was that the CBPRO was uniquely suited for this work because it was part of an American national nonprofit educational organization, while at the same time being a Puerto Rican outfit, staffed by Puerto Rican professionals sensitive to Latin American culture and able to offer technical assistance and the SSAT in the dominant Latin American language. This conviction was rooted in the role Puerto Rico was undertaking, since the advent of Commonwealth and with the support of the Kennedy and Johnson administrations, as a bridge between the two Americas. The fourth principle was the need to avoid going in as the providers of the one and only solution to their admissions woes and preaching to everyone that the American way was the right way. Unfortunately, this naïve conception of technical assistance was being practiced in some instances by public and private groups. Fortier had direct experience with it and with the natural negative reaction it produced. So it was necessary to understand that each country has its own conditions, its unique history, and was in a given developmental stage. Technical assistance has to be conducted "in an atmosphere of mutual respect," with emphasis on training and exchange of experiences.

One last principle was more of a hidden assumption that Fortier seldom expressed explicitly in official reports of this period but which the careful reader was able to detect in later reports when the NYO pressed him on financial self-sufficiency. He strongly believed that the work in Latin America was what he called "international public service" and as such deserved full financial support independent of the income it could produce. Thus we find some nuances when he explains the use of the SSAT in Latin America, oscillating between seeing a market to be conquered or a region in dire need of as much assistance as the United States could give.

2. The initial experimental administrations of the SSAT in Latin America and the first technical assistance activities (1963-64). Latin American Activities is formally organized under an Executive Director (1964). Responding to new requests from Latin America: Extension of the experimental administrations; completion of the normalization of the PAA™; the first institutional administrations for admissions; technical assistance becomes technology transfer (1964 to 1969). The CEEB's expanding role in international education: from testing to guidance. The "educational missions" experiment. Collaboration with NAFSA and LASPAU. Early work in financial aid for foreign students. The Vice Presidency for International Education (A. Sims), the Standing Committee on International Education, the Office of International Education (S. Jameson) (1964-1969). Attempts to establish the SSAT as a tool for admission of Latin American students and Spanish-speaking U.S. residents or citizens to American institutions.

The initial experimental administrations of the SSAT in Latin America and the first technical assistance activi-

ties (1963-64).

Strictly speaking, the beginnings of the Latin American activities of the College Board go back to the International Study of University Admissions directed by Frank Bowles in 1960-62 and to the survey of the problems of university admissions in Latin America conducted by Adolfo Fortier in 1962. It seems that Bowles had commissioned another study in 1960 or 1961 to survey the use of objective testing in Latin America. The researcher was Dr. Erika Grassau, director of the Instituto de Investigaciones Estadísticas at the University of Chile, and her study was published by the Institute in 1962. Dr. Grassau also codirected the national study of admissions in Chile for the International Study, and later was appointed to the first SSAT Committee of Examiners.

When the PRO was authorized by the Trustees, it was in everybody's mind that it would extend its work to Latin America even if in a cautious way. In addition to the development of the SSAT for Puerto Rico, the second stated purpose of the new office was "the provision of consultations services on admission problems within Puerto Rico and elsewhere in Latin America" (Pearson, 1962, Page 1). But the initial three-year budget was focused on the development of the SSAT with only a small amount for direct travel expenses outside the island. In spite of this, the plan mentioned possible experimental and consultation work in Central America, Mexico, Chile, and Colombia, subject to interest and funding forthcoming from the interested universities. Evidently in the beginning, expectations were high; the Plan even mentioned the possibility of a future Portuguese version of the SAT.

The inclusion of three Latin Americans in the first SSAT Committee in April 1963 was a definitive step. This was followed by the pretesting activity in Chile, Colombia, and Costa Rica in August of the same year, which was possible because of their presence in the committee. There is no record that the pretesting was externally financed except for the in-kind contribution related to administering the tests. This meant that Fortier used the old local strategy of poor families when unexpected relatives visited: "adding water to the soup," and found ways to print more booklets within the overall amount assigned for Puerto Rico. This inaugurated a PRO tradition of doing more with less, which has been present throughout its difficult financial history.

Meanwhile, during the second half of 1963, Fortier kept in touch with other educational leaders he had met during the previous year and who had showed substantial interest in the SSAT idea. The news that pretesting was already taking place generated several requests which confirmed Bowles's and Fortier's expectations. One request was for the CB to cosponsor a seminar on aptitude testing for Central American Universities. Another was for additional pretesting in Colombia. More interesting was the request from Catholic University of Valparaiso in Chile, to use the SSAT experimentally instead of its in-house-made test.

Accordingly, the first CB technical meeting held in Latin America took place in San José, Costa Rica, on May 6-9, 1964, cosponsored by the Executive Council of the Confederation of Central American Universities. The seminar's purpose was to discuss university admissions and the development of aptitude tests. Fortier, Dieppa, and the CEEB President Richard Pearson presented papers, and Frank Bowles was the invited special speaker. Three representatives of each of the universities in Costa Rica, Honduras, Nicaragua, El Salvador, and Guatemala participated. At the end, as is customary in Latin America, resolutions were discussed and approved. Two of them were extremely relevant to the future of the College Board's activities in the region. One resolution called for the universities' authorities to establish close collaboration with the CBPRO, and the other recommended that member institutions sponsor experimental testing of the SSAT in their universities.

After the Costa Rica seminar (1964), Fortier and the CEEB president visited Colombia at the invitation of the Association of Colombian Universities and held a one-day meeting with representatives of the 26 institutions in the country, the admissions officers from Colombian Universities. In the meeting a resolution was passed expressing special interest in the results of the proposed pretesting in Colombia. There was interest in considering the possible use of the Spanish SAT by the 26 universities in that country, although later they decided to develop their own aptitude test, and the PRO provided some technical assistance. Technical assistance was requested from the CB to train admissions staff, and collaboration was offered for experimental administrations of the SSAT.

At this juncture, Fortier felt that independent of the budget situation, the College Board "was now somewhat morally committed to define, in concrete ways, the means through which we can immediately provide technical assistance especially to our friends in Central America and Colombia." (Fortier, *Report to the Annual Membership Meeting*, October 28, 1964, Page 4).

In a December 1964 meeting in San Juan, the Trustees accepted a recommendation of President Richard Pearson

to change the PRO's status from an experimental program to a CEEB regular office. The reasons for this important change were the successful development of the SSAT, the fact that it was immediately used by all higher education institutions on the island, the continuing collaboration of the colleges and the PRDoE, and the increasing requests from Latin America for receiving technical assistance and conducting experimental administrations of the SSAT or *Prueba de Aptitud Académica*. A new position of "Executive Director for Latin American Activities" of the College Board was created and Fortier was appointed to it. Soon after, Jorge Dieppa was appointed director of the Puerto Rico Office, reporting to the executive director. This move not only was in recognition of the early achievements both in Puerto Rico and Latin America but also of the need **to direct more attention to both**. From then on, Fortier gave more of his time to develop Latin American activities and Dieppa remained in charge of the day-to-day operations in Puerto Rico.

The Trustees also authorized a three-year experimental project to be developed initially in Latin America, but with possibilities for expanding to other regions, consisting of "educational missions" to offer guidance services to applicants to U.S. colleges, including children of U.S. citizens living abroad, and to provide technical assistance to local educational institutions when requested.

Responding to new requests from Latin America: Extension of the experimental administrations; completion of the normalization of the PAA; the first institutional administrations for admissions; technical assistance becomes technology transfer (1964 to 1969).

During the second half of 1964, Latin American activities took off with all deliberate speed. There were four types of activities conducted from 1964 to 1969: (1) Experimental administrations of the first SSAT form in order to normalize the test; (2) Visits for technical assistance to several countries and institutions; (3) Institutional administrations through special agreements involving testing technology transfer; and (4) Presentations to U.S. groups with a major stake in foreign student admissions from Latin America. These activities were part of the coordinated effort to meet the Trustees' charge to the PRO, but each had its own characteristics and differentiated impact.

The pace of experimental administrations was truly phenomenal when one considers the extension of the region and the limitations of air transportation and communications at the time. The goal was to administer the SSAT in as many countries in Latin America and to as many students as needed for statistical analyses in order to determine the exact reliability and predictive value of the SSAT. Mutual benefits would result from these extensive experimental administrations. The Board would learn how its newly developed instrument behaved with different populations and how reliably it measured the aptitudes for college studies. The American admissions officers would need solid statistical information if they were to use the scores. On the other side, the Latin American institutions participating in the experimental administration were getting useful practical experience on standardized testing, acquiring direct knowledge about aptitude tests, and a better understanding of the American admissions practices. Instructions for people conducting these test administrations were sometimes given in workshops that brought together several site administrators at a centrally located country, or by air mail and phone. The same instruction manuals used for the regular administrations in Puerto Rico were sent with the test booklets to all the sites.

Between September and October of 1964, samples of students were tested in Honduras, Venezuela, Nicaragua, Costa Rica and Peru. In January 1965, 2,000 high school graduates were tested at the Catholic University of Valparaíso in Chile, and smaller samples in another Chile site and in Colombia. These were followed soon after by Guatemala, Argentina, and Uruguay. Later, samples in Ecuador, Mexico, Venezuela, San Salvador, and the Dominican Republic were tested. A total of 5,715 students in 18 countries participated in this process, with the largest group in Chile: 2,400. Of the two samples tested in Mexico, one was to become the first and longest continuous user of the test for admissions in Latin America. The Institute of Technology in Monterrey, better known as the *Instituto Tecnológico y de Estudios Superiores de Monterrey (ITESM)* used the tests in trial administrations for two years, then began using it regularly for admissions in 1967-68. Another pioneering administration took place in 1965 when 300 Colombian students were tested in collaboration with the Latin American Scholarship Program for American Universities (LASPAU) in what was the first time the SSAT was used outside of Puerto Rico as one criterion in a student selection process. Thirty students were selected to receive scholarships to study in the United States. Following this administration, the Colombian Institute for Advanced Training Abroad (ICETEX), which was responsible for most of the Colombian scholarship and student loans programs, requested to use the SSAT for selection of all its applicants, and the PRO made the test available free of charge, for an administration of a thousand candidates.

Not all attempts to conduct experimental administrations were successful. The largest university in Mexico, the *Universidad Nacional Autónoma de México*, showed no interest and the same was true at the *Universidad Nacional de San Salvador*. Due to difficult political situations, no attempt was made to get a sample from the national universities of Venezuela, Bolivia, and Paraguay. It should be remembered that the large national universities were very traditional and that ideological politics played a major role in them. The idea of an American admissions test was difficult to accept. The collaboration with the Universidad de Chile and the Universidad de Costa Rica was in many ways an exception, and in both cases the College Board's role was to support development of their own test.

Parallel to the experimental administrations described above, the CBPRO, with initial support from ETS, conducted the pertinent statistical analyses and reported these to the institutions and the CEEB International Education Commission. Although the individual reports were not found, most of them were collected and published in-house in 1972, together with validity studies conducted in 1967-68 and 1968-69 for institutions in Puerto Rico, Mexico, Colombia, and Venezuela. (CEEB. *Informe sobre las Administraciones Experimentales de la Prueba de Aptitud Académica en Latinoamérica*, Revisado en Marzo 1972.)

With a new test it is essential to win the respect of the professional community. The PRO did this in many ways, conducting and making public the supporting research, conducting discussions of the results with individual institutions, and through participation in regional conferences in Latin America, Puerto Rico, and the United States. One major opportunity for presenting the normalization and validity statistics produced by the five years of experimental administrations came in December 1967 at the Testing Section of the Inter-American Congress of Psychology in Mexico City. (Dieppa, *La Normalización en Hispanoamérica de la Prueba de Aptitud Académica*, 1967.) Jorge Dieppa, first technical associate and later director of the Puerto Rico Office, and the person responsible for the PAA development process and the supporting research, presented the first technical paper before an international specialized audience. At that time most testing conducted in Latin America used instruments designed elsewhere for non-Spanish-speaking populations and translated with or without adaptation. For that reason Dieppa began by explaining that the PAA was neither a translation nor an adaptation of the SAT. He described it as a newly developed test, similar in purpose and general concept to the SAT, but designed by an international committee that included experienced Latin American educators and whose items were written by Spanish-speakers with knowledge of Latin American educational systems.

A complete discussion of the statistical analyses conducted was given. There were some difficulties encountered in the statistical analyses: the samples from different countries were not identical, ranging from the last year of secondary school to college freshmen. Nevertheless, the 11 statistical indicators that were analyzed presented quite similar results across countries. The evidence showed that the test functioned well in all countries, with reliability coefficients above 0.86 in all cases. Also, correlations with secondary grade point average, where available, were quite similar. Only a few items were found that did not function well in a given country. Furthermore, the validity studies conducted for five institutions in Puerto Rico and one each in Mexico, Colombia, and Venezuela, showed that the PAA was as good a predictor of success, as was the SAT in the United States.

It had not been possible to conduct validity studies in U.S. institutions because it is difficult to establish adequate criteria for success due to the language of instruction and cultural environment differences, and because there are no universities that receive more than 100 students from Latin America. After cautioning the audience that the SAT and the PAA are not equated, Dieppa reported that correlation studies with students who took both tests in Puerto Rico showed a good positive correlation between the two tests: .62 in Verbal Reasoning and .80 in Math Reasoning. So even if it could not be asserted that scores in the two tests had the same meaning, they did rank students in the same order.

Closely related to these experimental administrations was an important ongoing information exchange on testing, evaluation, admissions, guidance, and the PAA. Senior staff from the New York office collaborated with Fortier and Dieppa making many trips to provide technical assistance and spread the message throughout Latin America, particularly in Chile, Colombia, Costa Rica, and Venezuela. Subsequent developments in national admissions tests in these countries were stimulated, strengthened, and nurtured as a result of this exchange, which also included receiving many visitors to Puerto Rico.

The need for technical assistance was very broad because, as we have seen, many Latin American institutions of higher education were engaged in a process of modernization, struggling against a strong tradition in an atmosphere of conflicting ideologies, and with limited resources. Assistance would have to include knowledge transfer and

practical know-how. The CBPRO could not respond to all the requests for assistance and had to focus on its own field of expertise. A workshop strategy was developed to provide basic knowledge with some hands-on experience. The staff designed two workshops to be conducted in Spanish, translated and adapted some SAT materials and prepared additional reading materials. One workshop covered basic concepts and steps in the development, construction and use of aptitude testing, and the other dealt with the systematization of the admissions process, including the use and interpretation of tests. These were conducted in shorter or longer versions, depending on the time available, in Puerto Rico and in several Latin American countries throughout these years. In addition, staff from the College Board in New York and ETS, as well as consultants from Board member institutions, participated in some of the training sessions.

As we already know, in 1964, President Pearson, Fortier, and Dieppa traveled to Costa Rica for a seminar on aptitude testing for the Central American Council of Universities, and then went on to Colombia for a seminar with that nation's universities in May. This same year, in August, Fortier went to Venezuela to participate in a seminar to design an evaluation program for the educational system in that country; and in November he visited the *Universidad Nacional Autónoma de México*, in Mexico City, to explore the possibility of an experimental administration there, and to Guatemala to participate in a testing techniques seminar at the University of San Carlos. In 1965, President Pearson and Fortier made an extended three-week trip, during April and May, to Brazil, Argentina, Chile, and Peru, to advise and work with institutions interested in developing and/or revamping their admissions programs. In August, Fortier, with CEEB consultant Dr. Arthur Welck, visited the Colombia Institute for Study Abroad to discuss a pilot project for the first Latin American College Board mission to offer guidance and testing services to American students living in the region and for Colombians interested in studying at a college in the States. Later, in September of the same year, a major workshop on admissions was held for the *Asociación de Universidades Colombianas*, at the *Universidad Javeriana*, in Bogotá where Fortier, Dieppa, the College Board Executive Vice President George Hanford, William Bretnall from ETS, and C. Kelsey from Texas Western College in El Paso, participated as presenters and consultants.

Early in 1966, Fortier met in Mexico City with Robert Wickham, regional representative of the Ford Foundation to discuss possible programs of technical assistance on admissions and a proposal made by the Board to Ford to co-sponsor a hemispheric conference on access to higher education in Chile. That same year Dieppa gave a paper at the Iberoamerican International Seminar on School and Professional Counseling, held in Madrid, from April 17 to 23. In December, Fortier presented a paper on the importance of selectivity in student exchange programs, at the First Latin American Seminar on Educational Loans, held in Lima, Perú. Delegates from all Latin American countries and from educational foundations in North America met to discuss ways of improving scholarship and loans services for Latin American students interested in studying outside their countries. In August 1967 Fortier visited the Naval Academy of Venezuela as a consultant on admissions and arranged for a PAA pilot administration for 500 candidates. He also visited *Universidad Nacional Pedro Henríquez Ureña*, a new institution sponsored by industry and business in the Dominican Republic. Arrangements for a PAA pilot administration with 500 students were completed. In 1968, Dr. Dieppa was invited by the *Universidad de Costa Rica* to evaluate and make recommendations on the admissions exams used by that university. He was hosted by the *Instituto de Investigaciones Psicológicas*, directed by Dr. Gonzalo Adis Castro, who was a member of the first PAA committee in 1963 and a leader in the development of that university's admissions test.

Throughout these years, the PRO hosted many Latin American visitors who came to see firsthand the testing system developed for Puerto Rico and to receive technical advice and/or training. These visits normally lasted for two or three days, but some were longer and involved intensive training. In 1968, Mrs. Senta Essensfeld, director of the Student Services Department of the *Universidad de Caracas*, Venezuela; Dr. Marta M. de Mastrogiovanni, from the Ministry of Education of Argentina, spent a few days at the PRO; and Mr. Nelson Rodríguez, from the *Instituto Venezolano de Investigaciones Científicas*, spent the month of September at the PRO to study test construction methods and the admissions and guidance process in colleges in Puerto Rico. In December, five members of student loan programs were hosted by Fortier at the PRO to organize a new organization integrating all countries in the region: Julio A. Quesada (Panama), Gerardo Eusse Hoyos (Peru), and José Manuel Sánchez, Georg Hall, and Eduardo Plaza (Venezuela). This group later became known as APICE, *Asociación Panamericana de Instituciones de Crédito Educativo*.

In 1969, the most important visitors were Dr. Eloy Lares Martínez, chancellor, and Dr. Francisco Kerdel Vegas, vice chancellor, *Universidad de Caracas*, and Jeanette Machado, from *Universidad Metropolitana*, in Venezuela, who came to get acquainted with the work of the PRO and explore collaboration in admissions and testing. Dr. Jorge J. Dieppa

was invited to visit Venezuela from April 21 to 25, where he provided technical assistance for the organization of an admissions office and the experimental use of the PAA at the *Universidad de Caracas*. Similar assistance was provided to the *Universidad Metropolitana*, and exploratory visits made to other institutions. Another important visitor was Rafael Tapia Garibay, deputy director of the School of Mechanical and Electric Engineering at the National Polytechnic Institute of Mexico, who stayed for several days to familiarize himself with the PAA test construction process and its use for admissions. The same year, 14 educators from Brazil visited the PRO in a program sponsored by the Department of State and coordinated by a committee from the Puerto Rican institutions and the College Board. Also, staff from ASPIRA, an organization founded in New York but recently established in Puerto Rico, visited the PRO to get to know its programs and explore collaboration. Near the end of 1969, Dr. Roger Llerena, director of the Office of Admissions at the Pontifical Catholic University of Perú, visited the PRO for continuing collaboration with the experimental administration of PAA in that institution and to explore conducting validity studies.

The activities conducted by the CBPRO in Chile, Colombia, Costa Rica, Mexico, and Venezuela from 1963 to 1969 went beyond the norming process of the SSAT, which ultimately was of interest mostly to the College Board. In these countries, in addition to the experimental administrations with small samples of students, there were special administrations to larger groups of applicants for admissions to specific institutions. In some instances, these were conducted as a trial which resulted in later adoption of the test in some of the institutions. However, in other cases, these special administrations were a contribution to the development of a national test with the College Board actually transferring test development knowledge and techniques, sharing the use of test items and complete test forms, and conducting statistical analyses.

This statement from Fortier is indicative of the support provided:

[W]e have lent a version of the Spanish SAT to some universities in Latin America. If the results are promising for the institution involved and the potential use is proven, then we have agreed to provide additional test material and interpretative assistance at a very minimum cost. The latter has already been done with four institutions with the understanding that this will be done for a limited period of time, normally two years, until they can develop, on a national or regional basis, their own test. In this manner we want not to interfere in any way possible with a local development that could serve better their particular needs. (PRO, A College Board Special Program in Puerto Rico: A Progress Report. January 1968, Page 5)

Four universities and a scholarship-granting organization conducted special trial administrations for student selection from 1964 through 1968. The number of administrations ranged from one to three before the decision was made to use the test for admissions.

The *Universidad Javeriana* in Bogotá, Colombia, the Jesuit Catholic institution that had pretested the original items developed for the first SSAT form in 1963, conducted two trial administrations, testing over 1,700 students, and became a regular user in 1968, paying a modest fee for the test booklets and technical services, including scoring. The *Universidad Católica de Valparaíso* in Chile tested 2,400 students in January 1965; the *Universidad de Oriente* in Cumaná, Venezuela, conducted one trial administration, as did the *Instituto Tecnológico de Monterrey* in Monterrey, México, before becoming regular users. More often than not, the PRO provided the test booklets at no cost to the institutions. Later, a modest fee was charged to cover the test booklets, shipping, and scoring costs. By 1968 and 1969, the *Universidad de Caracas* in Venezuela, and the *Universidad Nacional Pedro Henriquez Ureña* in the Dominican Republic had also joined the program. A contract was signed with the Venezuelan institution to provide technical assistance in designing a selective admissions system.

The universities of Chile and Costa Rica, as well as the Colombian Association of Universities, had decided early in this period (1963-65) to develop or revise their own institutional or national tests, at least partially adopting the College Board model of aptitude testing. The PRO supported these developments in several ways by providing training, lending test booklets and test items, and conducting joint research. Unfortunately, the records of these activities have been lost, and we have been able to reconstruct them only partially and in general terms.

Collaboration between the CBPRO and the University of Costa Rica began in 1963 when Dr. Gonzalo Adis Santos was appointed a member of the first SSAT Committee. The original item bank was pretested in August at the same time that they were pretested in Chile and Colombia. In 1968, Dr. Dieppa was invited by the *Universidad de Costa Rica* to evaluate and make recommendations on the admissions exams used by that university. He was hosted by the

Instituto de Investigaciones Psicológicas, directed by Dr. Gonzalo Adis Castro.

As we already know, the CBPRO's working relationship with admissions testing professionals in Chile began immediately after the office was established, as Dr. Erika Gassau, from the Institute of Educational Statistics, was appointed a member of the SSAT Committee of Examiners. In 1963, the items developed for the first form of the test were pretested with over one thousand students in that country. Later, the first test form was administered to a sample of 300 candidates for admission at the Catholic University of Valparaíso. After this experimental administration, the university requested to use the test on a trial basis with the complete pool of applicants for 1965. Over 2,000 applicants took the test. That same year (1965), an agreement was reached with the Institute of Educational Statistics of the University of Chile, the national university, to facilitate the exchange of aptitude items, and the same arrangement was proposed to the Testing Division of the Colombian Association of Universities. There is no evidence of how this was implemented.

Work with Colombia also began with the appointment in April 1963 of Father César Jaramillo, from the Jesuit's *Universidad Javeriana*, as member of the first test committee, and continued with the pretesting of the first items with 1,309 students in August 1963. The first test form was administered experimentally for normalization in January 1965, also at the same institution. That same year a major technical conference was jointly sponsored by the College Board and the Association of Colombian Universities. This conference took place in September of 1965 at the facilities of *Javeriana* and brought together admissions staff, testing people and officials from most of the Colombian universities. The College Board had a small but solid contingent representative of the organization and its work. Adolfo Fortier and Jorge Dieppa from the PRO, the Executive Vice President George Hanford from the New York headquarters, William Bretnall, testing expert from ETS, and C. Kelsey, an admissions officer from Texas Western College in El Paso, all made major presentations on admissions policy and test development, and provided as much technical knowledge as was possible in a three-day span.

This conference in Bogotá and its workshops must have played a major role in stimulating and nurturing the Association's decision to develop a national test. At the end of the meeting, several resolutions were approved that were important steps in the establishment of a modern admissions system, such as taking into consideration the high school grade index, general use of a scholastic aptitude test, and efforts to establish close working relations with the high schools. The meeting also recognized publicly the contributions made by the College Board and expressed the desire for continuing collaboration. It is in this context that Fortier later made the announcement of the agreement to exchange items and technical knowledge with Chile and Colombia. As a matter of fact a few years later, when the Colombian national scholastic aptitude test was administered, the PRO provided technical assistance for *Javeriana* to conduct a study correlating the new national test with the SSAT. Eventually, when faced with financial difficulties in the seventies, this institution was forced to discontinue using the College Board test.

From today's (more business oriented) perspective, some of the decisions and actions that we have described are somewhat difficult to understand. But we must remember Fortier's philosophy of international public service, and his avoidance of any form of educational colonialism, which must have been shared by at least a few senior College Board officers, particularly those closer to Frank Bowles's vision. Fortier was convinced that:

These developments have a great potential in terms of effective exchange of technical information, joint research, and many other internationally oriented projects... [which] will naturally result in the improvement of international exchange of students. Obviously, the development of measurement techniques that may provide common scales of measuring academic quality and achievement in differing educational and cultural systems will be more than welcome by all. (PRO, College Board Activities in Latin America : A Progress Report, January 1966, Page 5)

This idea of common international scales, which was one of the justifications given for these projects, is stated in very general terms, and no technical account of what was intended was given. We can speculate that they saw the possibility of conducting research that could lead to a common international test, or perhaps the equating of different tests that shared a number of common items, or developing conversion tables to move from one test's scores to another's. These ideas were being discussed by psychometricians and testing experts at ETS and in other places. As a matter of fact, a few years later, William Angoff conducted two such attempts to correlate the SAT and the PAA in 1972 and 1985. In other reports, both Fortier and Sims stated that some testing experts were talking about a "possible ecology of aptitude measurement," in which, as they put it, "the interactions of patterns of ability with student

backgrounds, institutional goals and values and cultural settings are more rationally conceptualized.”

For reasons unknown, Mexico had no initial presence in the development of the SSAT. There was no member from that country in the committee and no pretesting of items was conducted there. We know that in November 1964, Fortier visited the largest and best-known public institution, the *Universidad Nacional Autónoma de México* (UNAM), to explore the possibility of an experimental administration. It seems that they were not receptive. But he was able to make arrangements with two of the most important private institutions in the country: the *Universidad Autónoma de Guadalajara* in the capital of the state of Jalisco, and the ITESM in the large industrial city of Monterrey in the state of Nuevo León. In these institutions, experimental administrations of the first test form were conducted in 1965, with samples of 495 admitted freshmen and 464 applicants for admissions, respectively.

The Monterrey Institute used the test in trial administrations in 1966 and 1967, and began using the test regularly for admissions in the year 1968. In the annual 1967-68 report, Fortier announced that the Institute “will be using it operationally this year with an interest in becoming a regular member of the College Board, since they are accredited by the SAC.” As a matter of fact, at the College Board Forum, held in October 1968 in New York City, the ITESM became the first Latin American institution accepted as a member of the organization. It has continued to be a member and a user of the PAA to this day. The relationship of the ITESM and the College Board was an important factor in the growth of the SSAT in Mexico during the late eighties and nineties. As the Institute established more campus all over México (36 of them by 2005) and gained prestige and presence in the country, other private institutions decided to use the test themselves.

The mission established by the College Board for the PRO included the goal of using the SSAT for admission of Spanish-speaking students from Latin America to U.S. colleges. If this goal was going to be achieved it was necessary to engage in proactive communication with the admissions and foreign student counseling professionals in U.S. higher education institutions and with their national organizations. Cultural and linguistic frames of reference had to be overcome. For one thing, Puerto Rico was a small territory unknown to many, if not most, Americans, even those in higher education. For another, the perception of Latin America was too often confused and distorted by the confused and distorted perception many Americans had of the nearest countries: Mexico and Cuba. There was a lot of communicating to do to open doors and break down barriers to advance the ideas which had given birth to the PRO.

A first major exposure given in a College Board national publication to the Puerto Rico project came soon after the SSAT was developed and administered operationally in Puerto Rico and experimentally in Chile, Colombia, and Costa Rica. Under the title “Experiment in Puerto Rico,” the Spring 1964 issue of *The College Board Review* published four excellent articles written by John M. Duggan, College Board vice president, Fortier, Dieppa and William B. Bretnall from ETS. This was the first major effort to communicate to the College Board membership and the U.S. educational community what was going on in Puerto Rico. The articles covered the reasons for the experiment, the establishment of the office, the development of the test, including technical and statistical information, and the first operational administrations. Some important facts about Puerto Rico and its educational system and about Latin American students in the United States were also given in inserts. It provided a good comprehensive view of the first two years of the experiment. Unfortunately, it was not until the Winter 1982-83 issue of the *Review* that another article on the PRO was published.

From 1964 through 1969, Fortier and Dieppa gave talks, wrote papers, and participated in professional meetings on the mainland describing the work ongoing in Puerto Rico and its influence in the Spanish-speaking countries south of the border. These activities were in addition to what they were doing in Latin America. The substance of the message transmitted was essentially the same. After a brief summary of the reasons behind the founding of a special College Board office in Puerto Rico, the speakers would explain the development of the Spanish SAT, its use by the Puerto Rican colleges, its relation to the SAT, the collaboration with ETS, the experimental administrations conducted in Latin America, and the proposed use for admission to U.S. colleges of Spanish-speaking students. Depending on the audience, more or less technical information on the test was given.

In 1965, several presentations were made at U.S. conferences dealing with admission of foreign students. In November, Fortier presented an important paper, “Pre-Admission Guidance: A Key to Better Inter-American Student Exchange,” at the NAFSA Biregional Conference on International Education, held in New Orleans in November 1965, and then participated in a Workshop on Admissions of Latin American students held at the University of Texas in Austin in December of the same year. In this workshop, the PRO staff prepared materials describing the educational systems

in Latin America, which became the basic source for a mimeographed preliminary handbook on higher education in Latin America that the University of Texas's Office of International Education would update annually. As part of this effort to familiarize the American foreign student admissions community, Fortier was active in the Executive Committee to organize the NAFSA National Conference on International Education to be held in Austin, Texas, in 1967, in which Latin America would be the main theme. Also in 1965, Jorge Dieppa gave a paper at the Ibero-American International Seminar on School and Professional Counseling, held in Madrid from April 17 to 23.

In April of 1966, Fortier delivered a paper on "Problems of Access to Higher Education in Latin America" at the U.S. State Department seminar at the University of Kansas. The same year he talked on the importance of selectivity in student exchange programs, at the **First Latin American Seminar on Educational Loans, held in Lima, Perú** on December 5 to 8. Delegates from all Latin American countries and from educational foundations in North America met to discuss ways of improving scholarship and loans services for Latin American students interested in studying outside their countries.

The following year, in April 1967, Fortier talked about the development of the Spanish Scholastic Aptitude Test at the NAFSA 19th Annual Conference in Houston, Texas. He reported on the status of the Spanish SAT and how it had been administered experimentally in almost all Spanish-speaking countries and was being used operationally for admissions in several institutions. He then announced to the NAFSA audience that the first administration of the SSAT in a regular SAT administration date conducted by ETS in Latin America had taken place in March. He explained the difficulties encountered but reported that many U.S. institutions had shown interest in receiving the SSAT scores from Latin American applicants. He also expressed his expectation that two regular administrations would be given the following year. Later we will consider what happened to this part of the experiment, which was discontinued.

In 1968, the PRO arranged for NAFSA and ACRAO to conduct a workshop at the University of Puerto Rico from December 9 to 20, 1968, about problems faced by Hispanic Americans who apply for admissions to U.S. universities. Some of the participants visited several Latin American countries before the workshop, which was directed by Lee Wilcox, director of Admissions at the University of Wisconsin, and by Sanford Jameson, assistant to the CEEB vice president for international education. A. Fortier and J. Dieppa exchanged information on the admissions situation of Puerto Rican students and the use of the PAA.

During the sixties, the international activities of the CEEB were not limited to the experimental testing of the SSAT and the extensive work conducted by the PRO in Latin America. Under the leadership of Albert Sims, appointed Vice President for International Education in 1964, the Board was active in other fronts. A Standing Committee on International Education was established in December 1964 and functioned in an advisory capacity to Sims. Later, an Office of International Education Office was established. Sims' assistant, Sandy Jameson, became its Director and an Advisory Committee was appointed. A positive and proactive working relationship developed between the leaders of international work in New York (later in Washington, D.C.) and the Puerto Rico Office.

The issues related to the selection, admission, and guidance of foreign students, which Bowles had brought to the forefront, became an important subject of discussion and the object of study at the Board and in several other organizations. In 1963, the Board joined the Institute of International Education (IIE) to sponsor workshops to discuss uniform standards of admissions for foreign students and a study to collect data from certain U.S. institutions to establish correlations with the credentials they were admitted upon.

In December 1964, in a historic first meeting held outside the continental United States, in Puerto Rico, the Trustees established the PRO as a regular College Board unit and authorized a three-year experimental project to be developed **initially in Latin America, but with possibilities for expanding to other international regions**. The idea was to organize what were initially called "educational missions" to offer comprehensive services to applicants to U.S. colleges living in Latin America and technical assistance to the host countries. There were two types of students that could benefit from these services: local students coming out of the national public and private schools, and the children of U.S. citizens attending "American" and international schools that were being established in many of the large cities in the region. The proposed regional centers would be staffed by experienced personnel who could represent U.S. colleges and provide counseling on choosing the right college, relevant information on costs and financial aid sources, college brochures, etc., to support the students through their application and admissions process. Specifically, each mission would be composed of an experienced U.S. admissions officer and an experienced social scientist, together with supporting staff. The Trustees were thinking of several such "missions" and assigned a

\$500,000 top expenditure limit for the three-year experiment.

As conceived by President Pearson, Sims, and Fortier, these centers would have broader functions than the examination centers organized by ETS to administer the SAT, TOEFL, and other tests. The ETS centers functioned ad hoc in special schools and binational organizations for short periods of time synchronized with its testing calendar, whereas the new “educational missions,” later called “experimental test service centers,” were to be permanent full-year operations and be multipurpose. The Board’s special relationship with ETS naturally required considering joint operation, inasmuch as ETS was responsible for the administration of the SAT and the TOEFL in the region. Perhaps these considerations led to the name change to “experimental test service centers.” Anyway, the following description made by President Pearson, as quoted by Fortier, leaves no doubt that the idea was to provide broad information and counseling:

The plan should allow explicitly for the possibility that the Board and the other sponsoring groups might wish to build upon the testing activity an informational and counseling effort that would deal broadly with American higher institutions, course offerings, and admissions requirements. (Fortier, November 1965, Page 7)

Fortier strongly believed that the two groups of students that the centers would serve required different treatment. The American citizens were native English speakers and attended schools where teaching was in English, followed a general American curriculum and had some counseling available. These students could be treated essentially the same as the applicants in the States, but they needed information about studying in the States that was not readily available in their countries of residence. The local citizens, on the other hand, were native Spanish speakers whose English proficiency was very diverse depending on their socioeconomic level and the schools they attended. Some of the more affluent students went to American and international schools that U.S. citizens attended, and the less affluent ones went to private Spanish language schools or to public schools where English instruction was weak, counseling for college admissions nonexistent, and up-to-date information on American colleges not available. Consequently, very few, if any, students from this second subgroup were going to American colleges. This worried the social reformer in Fortier.

At a NAFSA Biregional Conference on International Education, focused on Inter-American student exchange, Fortier bluntly told his audience: “The truth is that all the preadmission and testing procedures required by U.S. institutions from foreign students are based on the assumption of counseling and guidance services **that do not exist in Latin America.**” (A. Fortier, *Pre-Admission Guidance: A Key to Better Inter-American Student Exchange*, November 4–6, 1965, Page 12). Fortier fully agreed with the then recent Tyler Committee Report, which called for strengthening preadmissions techniques and resources overseas in order to put some order in the foreign student traffic. But in a position that must have surprised many in the audience, he called on them not to place exaggerated emphasis on English language proficiency. He was worried that doing this was skewing the population of Latin Americans studying in the States toward the affluent, and leaving out many able middle class and poor students who could profit from studying in the States. The affluent were more proficient in English, were able to pay for their studies but were not necessarily the better students, and their lifestyle was not conducive to strong academic commitment. This was indeed a reflection of his social concerns and his personal experience as a graduate student in Syracuse and as Bowles’s assistant in the admissions office at Columbia. He was convinced that the good student would become English proficient in a relatively short period of time once immersed in an English-speaking college community.

Fortier argued that it was more important for the national interest of the United States to expose students from other socioeconomic groups to American values through college education, and that it was necessary to provide more scholarships to make it possible. He proposed that these applicants be tested with the Spanish SAT, which would give a more accurate assessment of their academic aptitudes than the regular SAT. The Spanish SAT should be available in the regularly scheduled SAT administrations. In the new centers, professional Spanish-speaking counselors would be able to understand and evaluate the student’s academic record and the aptitude scores. Then the TOEFL would provide a good measure of the candidate’s limitations in English, and the candidate could be placed in the appropriate developmental courses which, **together with the immersion factor**, would make him or her fluent in a relatively short time.

The proposed experimental centers would be ideal for serving not only American citizens living abroad but the locals who could benefit from studying in the States. During 1965–66, the College Board continued studying the desirability of offering guidance services to Latin American applicants to U.S. colleges. Dr. Arthur Welck, former director

of guidance and testing at the University of New Mexico, was appointed consultant to explore the feasibility of establishing the first center in Colombia. He worked closely with the Colombian Institute for Technical Study Abroad (ICETEX), where he also provided technical assistance on guidance and selection procedures. What happened after this effort is not clear, but it is not mentioned often in the PRO reports after 1969. Although the concept was not implemented as originally conceived, we do know that later the Board's Office of International Education became responsible for conducting workshops and preparing informative materials for counselors in foreign and "dependents schools." Undoubtedly, some of this activity spilled over to the local students not attending these schools.

It is important to understand the underlying values that led to these experiments and more broadly to the Board's concerns and activities in the international arena. In May 1966, Sims and Fortier wrote a paper, probably for the Trustees, which provided additional conceptualization for the international activities (A. Sims and A. Fortier, "International Activities and the Puerto Rico Office," May 1966). After taking notice of the attention being given nationally to the international dimensions of education and affirming that the Board finds itself in the midst of these concerns, having been approached for advice and assistance by other educational organizations, government agencies, foundations and foreign institutional representatives, they explain the College Board's role in the following statement:

Consistent with the Board's general objective of promoting access to higher education, its purpose in international activity is to extend educational opportunity by facilitating the international movement of students to and from the United States. It intends to realize this purpose by fostering understanding of educational attainments and needs, both individual and national, and, ultimately, by cooperating in deriving compatible systems, here and abroad, for transitions in higher education. (Page 2)

So that the international work is here justified as an extension of the Board's national general objective of promoting access to higher education, and even more so that the Board intends to cooperate in deriving compatible systems, here and abroad, for transition to college.

The paper goes on to describe what the Board was already doing to facilitate the "international movement of students." Under the CB and ETS direction, TOEFL conducted three annual international administrations and would begin offering institutional administrations to increase opportunity for foreign students. In Latin America, the Spanish SAT would be introduced as a regular offering on March 11, 1967. An ad hoc committee from the CSS® program was looking into policies and procedures for determining financial need and giving financial aid to foreign students. The Board supported African Scholarship for American Universities (ASPAU), including providing free SAT tests adapted for African countries and generous financial support for the program. Also, free use of TOEFL and the *Prueba de Aptitud Académica* (SSAT) by Latin America Scholarship Program for American Universities (LASPAU) in Colombia, Central America, the Dominican Republic, and Peru. The Board also promoted intensive and extensive workshop activity in collaboration with IIE and other organizations such as NAFSA and AACRAO, and took a leadership role in the newly created National Liaison Committee on Foreign Student Admissions.

Other important collaborations with foreign countries was also reported: Interaction with the Canadian Service for Admission to College and University; support for developing a local examination system in Ethiopia; collaboration with the Council of Europe in its attempt to develop a common set of examinations related to Dr. William Halls's (Oxford) comparative study of transition from school to university in Europe; and development of the "International Baccalaureate."

All this international activity seems to have created some tension in the special relationship between the College Board and ETS. It must be remembered that ETS opposed the establishment of the PRO probably because it meant losing the status of exclusive provider and administrator of all College Board tests. Now, it was being asked to administer the PAA in its regular SAT testing schedule and to join the Board in the experimental test service centers. The issue of organizational identity that has been ever present in this relationship until the twenty-first century had one of its early manifestations as a consequence of the extension of international work. Both organizations were conducting work internationally, separately and jointly, but in Sims' words, "the interests and capacities of the two organizations are not readily distinguished abroad." It was necessary to coordinate better so that the distinctiveness of each organization is safeguarded and their joint endeavors understood.

As reported, this situation was the object of high-level discussion, and the officers of the two organizations reached an agreement to pool their efforts in international work, particularly in Latin America, and carry on work in the region “jointly to the fullest extent possible.” The Ford Foundation, where Frank Bowles had moved as a senior officer, invited the two organizations to present a plan for work in admissions, testing, and access to higher education in Latin America (Page 10). It is not clear what came out of this initiative, but it was implied when Bowles, in a letter to Fortier, expressed his unhappiness with the fact that his successor was giving too much importance to ETS in detriment of the Board’s mission. “Dick, it seems to me, has gotten so concerned over the ETS relationship, that I fear he is losing sight of the Board’s programs and functions.” (Bowles, Letter to Fortier, December 17, 1968.) It was also indicated that the experiment to administer the PAA in regular SAT administrations was discontinued after three attempts due to low volume, as we shall see below, and that ETS established an office in Puerto Rico in 1967. The stated purpose of this office was to offer consulting services in test development to the PRDoE and to field test items for a Spanish version of the GRE. The Office also handled the SAT administration in Puerto Rico.

Attempts to establish the SSAT as a tool for admission of Latin American students and Spanish-speaking U.S. residents or citizens to American institutions.

One project on which it seems a somewhat fragile agreement was reached between the College Board and ETS was the experimental administration of the Spanish SAT or the *Prueba de Aptitud Academica* during ETS’s testing schedule in Latin America and in the States. This experiment responded to one of the original ideas behind the development of the SSAT at the PRO: making the test available to foreign applicants from Latin America and to Spanish-speakers living on the U.S. mainland. This in turn represented both a psychometric conviction that a better measure of aptitude would be obtained with a test in the student’s vernacular language, and an early concern with fairness toward Hispanics in the States. As reported in *Academia* (January 1967, Page 2), expectations were very high. The PAA would afford U.S. colleges and universities a new opportunity to assess for admissions purposes the substantial pool of Latin American students whose English competence was not high enough to get an accurate score on the SAT. In a survey of institutions with Latin American students enrolled, 280 institutions indicated interest in the use of the PAA. Some of them already required the test for admission (obviously these were the Puerto Rican institutions, as we know of no institution on the mainland requiring the PAA scores at this time), and others would use them for purposes of orientation and to complete the information available in cases difficult to decide. Schools have been sent the list of institutions interested in receiving information about the PAA scores and two thousand students were expected to take the test. The LASPAU project was expected to be a source of candidates as they had decided to require the PAA and the TOEFL for all scholarship applicants after the initial free administrations subsidized by the College Board.

The first administration took place on March 11, 1967, and two others followed in October 1967 and in February 1968. Unfortunately, the expected candidates did not materialize, and the administrations were discontinued soon after. At the PRO, we found no document explaining this decision, only brief statements such as this one found in a PRO’s special 1966-69 three-year report:

“For the year 1967-68, we felt ready to offer regular administrations in all Latin America and this was done in March and October of 1967, and in February of 1968. The test volume was disappointing in light of the survey made last year of universities in the United States that indicated there was considerable interest in using this examination with their applicants from Latin America.” (PRO, Latin American Activities 1966-69, 1969, Page 1)

Several difficulties were encountered in the March 11 testing, both in Latin America and the United States. Information on test date and sites was communicated late in the academic year. Fewer than 250 students were tested. Not many colleges were found with sufficient numbers of students to be able to conduct validity research. This meant that only validity statistics for Puerto Rico, Mexico, and Venezuela were available, and these would not be valid for American colleges, so that they would be reluctant to use the scores. Although we have not found the volume numbers for the October and February administrations, we know that they were again disappointing. Fortier would continue to defend the use of the PAA for admissions to U.S. colleges and called on the colleges themselves to norm the test for their campus. As we found out later, West Texas University, later the University of Texas at El Paso, did exactly that, and has remained the only regular user to this date.

This experiment failed, and with this failure one of the reasons leading to the development of the Spanish SAT went unfulfilled. It has remained so until today. Even students from Puerto Rico are required by almost all institutions

on the mainland United States to take the SAT in spite of the psychometric contraindications and today's increased awareness of the fairness issue. The reasons for this failure are not clear. In an interview with this researcher in May 2007, Sandy Jameson expressed his view that it was a problem of the high costs involved in working with ETS. We know that the PRO faced the same problem with costs of the initial scoring and statistical work conducted at ETS for the first several PAA administrations.

Not having the benefit of documents evaluating the experiment, one can only speculate on the reasons for this failure. It seems to this observer that the experiment was not properly planned or efficiently implemented and that both ETS and the College Board were at fault. This had to be treated as a major launching of a College Board product with important international repercussions. It called for a special communications effort addressed to high schools in the States with large groups of Hispanics, to the American and international schools in Latin America, to the best private and public secondary schools in the large cities of the region. One wonders if after the initial survey of colleges to determine interest in considering PAA scores, there were follow-up mailings. We have found no evidence in the PRO archives of any intensive communications effort, only brief references to the survey and to lists of interested colleges being sent to schools. How could the actual number of students examined be so far off from the expected 2,000? Could it be that ETS was not really committed? Did the Board, in the NYO and in the PRO, have the resources to support an intensive and extended effort? Was it a question of bad timing? As we shall see later, from 1966 to 1969, the PRO was engaged in developing the achievement tests and the advanced level program. Staff was fully committed to these projects, Fortier had to invest more of his time to securing financial support for the new tests, and to convince the colleges to accept the advanced level concept. In addition, the NYO was putting pressure on the PRO to achieve self-sufficiency. For whatever reasons, the experiment was discontinued in 1968-69, and only a handful of institutions accepted the PAA scores.

In a March 1977 paper, Fortier reviewed this experiment. The following sentences are the essence of his perception of what happened. ETS "was asked to design and implement, in consultation with the Puerto Rico Office, a plan to make PAA available as an operational test in all Latin America, starting in March 1967, to serve applicants to colleges in the United States" (Page 1). During 1967-68, the PAA was available in the regular College Board test centers in Latin America. "Soon it was discovered that the mainland colleges and universities did not have the necessary knowledge or interest in the PAA at that time and, as a result, the numbers of candidates registered to take the test did not justify a regular program of such magnitude." This is interesting and suggests that no real effort was made by the CB, ETS, or the PRO to inform the U.S. colleges about it. Without this information, it is no wonder that it failed.

3. Interpreting the CEEB's impact on the admissions process in Latin America during the foundation years. Important private institutions begin formal use of the PAA as their admissions entrance examination. The PAA becomes the source of several national admissions exams. A vision for systematization of admissions emerges from the CBPRO. The CBPRO: founding member and technical advisor of APICE, a federation of student lending organizations in Latin America (1968).

There is no doubt that the work of the PRO from 1963 to 1969 had a very important, perhaps decisive, impact on the policies and practices related to admissions in several Latin American countries. During these years, senior College Board officers were active supporters and direct collaborators of the PRO in this work. The Board's influence covered four important dimensions of the access/admissions problem. First of all, the work of the Board helped transform the discussion at the level of policies and broad practices. Second, it helped develop the culture and technology of academic aptitude testing based on the SAT/ PAA model. Third, by allowing the free use of the PAA and exchanging aptitude items it helped develop national tests in Chile, Costa Rica, Colombia, and Venezuela. Fourth, the adoption of the PAA as the official entrance examination by several prestigious private institutions made possible the accumulation of controlled experiences that in many ways set the standard in admissions practice and eventually made the PAA attractive to other important public and private universities in the region.

In the interest of historical truth it should be stressed that in several countries there were already groups of educators and psychologists working in testing and proposing changes to the admissions policies and practices. U.S.-published tests of the Differential Aptitude model had been translated, adapted, normed, and were in use. And as Fortier reported in his 1962 study, there was a tradition of achievement tests even if these were not constructed to high psychometric standards. In a few countries, particularly in Chile, Colombia, and Costa Rica, test construction was improving and professional test developers were taking charge. But the visits, conferences, seminars, training workshops, experimental administrations and other activities conducted by the PRO stimulated and strengthened their position and provided needed technical assistance to accelerate the changes in which many of them were engaged.

The activities carried on in Latin America were indeed an extension of the College Board's mission in the United States. But the social, economic, and educational conditions in Latin America were quite different from those prevailing in the United States. The aim of rapidly increasing access required a level of commitment from the government and the dominant sectors that was not easily obtained; thus significant increases in the national rates of growth in higher education opportunities were impossible to achieve in a short period of time. It was therefore necessary to develop a specific vision for access, guidance, and admissions that balanced the real conditions in Latin America and the aim of creating more opportunities. Because of his direct knowledge of the issues and of the region, developing this vision and its specific strategies was Fortier's responsibility. If, after the 1962 study, he already had a good grasp of the problems and some ideas of what should be done, he waited several years to allow his ideas to mature. These were years dedicated to continuous dialogue with Latin Americans and to reflective analyses of the initial experiences with the *Prueba de Aptitud Académica* in Puerto Rico, Chile, Costa Rica, and Colombia.

By 1965, Fortier had developed a comprehensive vision and decided to make a major presentation at the Fourth Colombian Seminar on Admissions, cosponsored by the Board and the Colombian Association of Universities, held at the *Universidad Javeriana* in Bogotá on September 27–30. (Adolfo Fortier, *La Sistematización de la Admisión Universitaria*, 1965. 22 páginas). Fortier brought a team of consultants to make additional presentations and participate in the discussions: College Board Vice President George Hanford, William Bretnall (ETS), C. Kelsey, (Texas Western College in El Paso), and Jorge Dieppa. It was expected to be a typical Latin American academic meeting with lively discussions and strong critical reactions.

Fortier began with a realistic analysis of the prevailing situation of limited access to higher education. The gains in elementary and secondary education were increasing the demand for higher education opportunities, but the universities were struggling with the realities of traditionalism, ideological conflicts, and very limited resources. Latin America had one of the slowest and smallest rates of growth in higher education anywhere. It was urgent to develop means and ways to increase access of the most capable students to the universities and to create new educational alternatives so that more youth can be educated according to their abilities and interests. His prescription was dual: Selective admissions for the universities and increasing the diversity of opportunities for postsecondary education. In order to use the available resources efficiently, it was necessary to have an objective and just selection process to choose those students that have a higher probability of achieving success. This is really much more democratic than the prevailing system, which in theory is open for all, but that in reality produces an intolerable rate of failure and waste of limited resources.

Fortier argues that many of the existing admissions systems really functioned, whether by design or not, as systems to “eliminate” students to reduce the pressure of the demand. Paradoxically, this is the case even in those institutions that admit everyone, because elimination then takes place during the first year when the blame can be placed on the student for not rising up to the standards. The contents of the subject-matter entrance examinations and the standards for admission were established without due regard for the real achievement levels typically produced by the schools. Fortier described this as setting standards in a “pedagogical vacuum.” Since vacuums have a tendency to be filled, the improvised social solution to this situation was the multiplicity of preparation courses, some for a fee and others free, set up by schools and enterprising teachers to train students to pass the exams. In some countries, even passing the exam meant only going into a full-year's remediation program followed by more exams. The inefficiency and social cost of these systems, which in at least one country had more than 15,000 students enrolled, was beyond comprehension.

The real solution was to substantially revamp the admissions process and establish an efficient system based on reliable and valid tests and the secondary school record to select the students with the highest probability for success. In order to achieve this in the long run, broad changes in educational policies and secondary school practices were necessary. But in the short run, it was possible to improve the admissions system before all the other major changes took place and use the improvements as a catalyst for bringing about change in the schools. .

In this regard, Fortier proposed a number of changes at the broad level of educational philosophy and policies that together constituted a formidable educational reform. It was necessary to diversify secondary education so that it was not exclusively preparatory for higher education, but could also include programs preparing students for work and for technical studies. Guidance and counseling programs should be established in all secondary schools to support the students' process of choosing and planning their future. New technical postsecondary programs should be developed with universities' direct participation to ensure quality and social acceptance. This would create new opportunities for students interested in technical degrees. He also called on universities to go beyond traditional classical professions

and strengthen new technological and management degrees, which are essential for socioeconomic development. Since the future was going to bring additional demand for opportunities, it was also necessary to build new campuses and expand university extension programs. Finally, the issue of inadequate preparation required that the university accept the responsibility of completing the students' preparation for professional studies, formally integrating transition programs such as the general studies and common core curriculum already established in several of the Central American institutions and in Puerto Rico.

Even if the broad reforms enumerated above were not all possible in the immediate or near future, Fortier recommended going ahead and improving the admissions process. A most important first step was to integrate the admissions function in one central office using the same standards and selection methodology for all students. It was necessary to put an end to admission by each Faculty. The admissions policies and the administration of all aspects of the admissions process should be placed at the highest university decision-making level to ensure that admissions policies and practices reflect the university's academic and social mission and not the special interests of a Faculty and profession. Admissions criteria and standards should no longer be established "ideally" in terms of what the university considers are the optimal requirements. In fact, students emerging from the growing secondary school systems were going to present a wide spectrum of knowledge, abilities, and weaknesses, as well as diverse interests and social backgrounds.

Drawing on the American experience and on its adaptation to Puerto Rico, Fortier argued that there were systematic techniques for admissions which had proven effective to classify large number of candidates with different levels of abilities and rank them in terms of their potential for success in higher education. The more acute the demand versus supply deficit becomes, the more useful and efficient these techniques are. Scientifically developed tests to measure abilities that are necessary for higher-level learning have been designed and are in use to predict success in university studies. A program of continuing research makes it possible to refine and readjust the test and its uses in terms of empirically validated experience. Establishing committees of examiners to work jointly with testing specialists following a systematic methodology would certainly result in better tests and more accurate measurements. Fortier discussed the superiority of aptitude testing over testing subject-matter information and made reference to the SAT used by many American universities, and to the PAA which was being effectively used by all universities in Puerto Rico.

An efficient admissions system would also make proper use of the secondary school record, which represents several years of achievement in different courses and numerous judgments made by a variety of teachers. Fortier was aware of the many questions raised about the quality of secondary school grades and the inconsistencies in standards among schools, but he reaffirmed that all evidence suggests that grades should be used for the prediction formula. He even told his audience something they would not readily accept, that in many jurisdictions grades had been shown to be better predictors than test scores. He recommended that all the universities agree to use the same test. The generalized use by all universities in a given country of the same standardized instrument to measure student abilities developed by the end of secondary school, and the research conducted to validate test scores and the secondary school grades against success in the university, were an invaluable source of statistical information and educational feedback relevant to improving the educational and social policies in the country.

It should be noted that these comprehensive proposals presented by Fortier and supported by other Board staff were well received. George Hanford commented on the mostly positive discussions in the different sessions, as he also took note of some strong dissenters. But at the end of the day, resolutions were approved in favor of many of the changes proposed. Subsequent encouraging developments in Colombia and in Central America were indeed stimulated and accelerated by these discussions. This influence was strengthened from 1965 to 1969 through repeated technical visits, the increase in experimental administrations of the PAA, the continued presence of Latin Americans in the PAA Committee of Examiners, the short and longer training sessions in Puerto Rico, and the initial validity studies conducted for all institutions in Puerto Rico and for three important institutions in Colombia, Mexico, and Venezuela.

In conclusion, the College Board, through its Puerto Rico Office, had established itself as a major contributor to the modernization of admissions and as a promoter of increasing postsecondary opportunities to accommodate the growing diversity of students emerging from secondary schools in the region. But the Board's influence was not limited to admissions. Closely related to this influence in aptitude testing and systematization of admissions were three collateral areas where the influence of the College Board was also important even if not as strong and successful as in admissions and aptitude testing. These areas were guidance, student financial aid, and facilitating admission of Latin American students to American colleges on the U.S. mainland and in Puerto Rico.

The activities related to guidance in Colombia and the collaboration with LASPAU to establish a solid scholarship program for Latin American students to attend American colleges have been described in previous sections. But the support given by the College Board/PRO to the *Asociación Panamericana de Instituciones de Crédito Educativo* (APICE) needs further explanation. This Pan-American association was organized in the early sixties to bring together the national organizations promoting and administering student aid scholarships for students and professionals interested in studying abroad. Fortier was one of the key leaders in this endeavor and the support provided by the College Board was critical in the organizational stage. The association charter, statutes, and by-laws were written at the PRO, at a meeting of the founding committee in December 1968, hosted by Fortier in San Juan. The PRO was a founding member of the group, and Fortier consistently participated in the annual conferences. He remained an adviser to the APICE board of directors until his retirement in 1987. Staff from the College Board's CSS program provided additional technical advice during the initial years. At APICE's Eighth Congress, held in Porto Allegro, Brazil, on September 9–13, 1979, Fortier received a special recognition for his contributions as advisor since the organization was founded. APICE has remained to this day the preeminent Latin American private not-for-profit organization in financial aid.

D. The Puerto Rico Office becomes a regular CEEB unit, establishes a close working relationship with the Puerto Rico Department of Education, and begins expanding its programs to meet other needs of education in Puerto Rico.

As we already know, in December 1964, 10 months after the first PAA administrations were held in Puerto Rico, the Trustees met in San Juan and changed the status of the PRO from experimental to a regular program. Fortier was appointed executive director for Latin American Activities and soon after, Jorge Dieppa was appointed director to run the day-to-day operations in Puerto Rico, reporting to Fortier. With its new status, the PRO immediately began looking for a location better suited for its activities and future growth. In January 1966, the PRO moved to the Banco Popular Center, a full-service new building in the developing banking sector of Hato Rey, leasing twice the floor space it had previously in the small Hato Rey Inn where they had rented temporary space in 1963.

No account of the foundation years of the PRO would be complete without describing the special relationship that emerged between the CBPRO and the Puerto Rico Department of Education, which was unique within the College Board, and which soon made possible the first important expansion of Board services in Puerto Rico.

1. The beginning of a close collaboration between the College Board PRO and the Puerto Rico Department of Education and the impact of this collaboration in K-12 education.

From 1963 to 1969, the CBPRO and the Puerto Rico Department of Education¹⁰ developed a very close relationship, working hand-in-hand on several important educational projects. This collaboration began before the PRO was founded because the highest officers of the Puerto Rico Department of Education expressed full support for the idea of establishing a College Board office in San Juan when Fortier met with them in 1962. Throughout the history of the PRO, this relationship has taken different forms, from free technical aid, consultation, and training, to grants and contracts to develop tests to meet the Department's needs. More important, it has remained strong through numerous changes in the Department's administration as well as in the political party controlling the Commonwealth government. As some observers have commented, the College Board gave continuity to an educational system whose direction and policies were too dependent on who won the elections every four years and who was appointed Secretary of Public Education. The CBPRO's independence of the electoral political process gave it credibility at all levels of the educational system, and it became a respected educational organization. To our knowledge, no other unit of the College Board has maintained such a relationship for so long with any state department of education.

There were several reasons for this. For one thing, in 1962 there was no other organization in Puerto Rico with similar experience in testing and in the issues related to preparation and transition to college. As we have seen, the government was making a substantial investment in education, and the demand for access to higher education was accelerating. It became important to provide objective feedback to the public schools in order to strengthen areas

10. A clarification is in order concerning how this agency will be identified in the text. The agency was originally called "Department of Public Instruction," but this was later changed to "Department of Public Education," which was later shortened by usage to "Department of Education." In this text, I will normally use this latter name, often shortened to "the Department" when the context is clear. Also, for better space use, I will use the abbreviation PRDoE.

which were found weak. The fact that the College Board was long established in the United States, that it had become a source of objective information on achievement, counseling, and preparation for college, that it was a not-for-profit association, and that Frank Bowles and Adolfo Fortier were well-known to the island's educational leadership of the sixties, were indeed major reasons Fortier sought the advice and consent from the Secretary for every major project, he strategically appointed key staff members from the Department to the PRO committees of examiners, and later to the Advisory Council when it was established. And whenever the Department requested advice and support for its programs, it was given with no strings attached.

The development of the PAA and ESLAT in 1963 was the first opportunity for collaboration. Staff from the Department participated on the two test committees, in the training workshops for item construction, in the organization of the pretesting sessions, in the student registration process, and in the administration of the first operational tests. The second opportunity came soon enough during the same year when the PRO agreed to assist the Department in the evaluation of a new special high school program aimed at above average or talented students. This was a multidimensional effort that integrated a more demanding curriculum and improved guidance and counseling, in-service teacher training, and alternative training for new teachers. It was funded by a Ford Foundation grant. The project was the brainchild of the then Under Secretary of Public Education, Angel Quintero-Alfaro, a Chicago Ph.D. who came to the Department after several successful years as Dean of the Faculty of General Studies at the University of Puerto Rico in Rio Piedras. This Faculty was responsible for the freshman year core curriculum on that campus. He was convinced that the better high school students could handle most of the content of the college freshman courses and secured a grant from Ford to try it out.

A contract was signed in June 1963 by which the PRO would provide technical support to evaluate the project. In December, a two-day seminar was held to discuss the project goals and design the evaluation plan. As part of the evaluation, 132 eleventh-grade students were allowed to take the PAA in February 1964 and others in April. In that year's annual report, Fortier explains that he saw this project as a first step in the development of an advanced placement program similar to the one in the States.

In addition to the specific projects described above, three other areas were identified as requiring urgent action: secondary school guidance and counseling; testing achievement in the basic subjects, improving classroom tests; and the teaching of English. These areas were well within the range of the College Board's mission, and the PRO supported the Department in efforts to improve them during these years. The CBPRO provided technical aid, conducted workshops, brought in consultants from the mainland, partnered with the Department in securing external grants, and coordinated advisory committees.

In the area of guidance and counseling, the needs were many as the number and training of the existing counselors were not nearly sufficient for the expanding secondary school population. The use of the PAA and ESLAT for admissions had created a new situation for counselors and principals, so the PRO began conducting short informative meetings to familiarize them with the basics of the new tests and how they would be used by colleges. But more formal training was needed. A joint proposal to the Charles E. Merrill Trust was successful, and a small grant funded four two-day precollege counseling workshops, held in April 1965. Over 300 counselors received training on College Board programs and in techniques to help students plan for higher education in Puerto Rico. PRO staff, college admissions officers, PRDoE staff, and consultants from CBNYO, made presentations and conducted sessions. A translation and adaptation into Spanish of the *Guide for Counselors and Admission Officers* was prepared and distributed to participants. Later, the workshop's memoirs were published and sent to all counselors and principals on the island. The counselors had requested more information on the colleges, their offerings, admissions requirements, and costs. The PRO responded by preparing a small guide to college studies in Puerto Rico, which was distributed free to students registered for the admissions tests.

The collective impact of these activities was significant in many ways. The counselors began looking to the College Board as a source of professional development. Bonding was established as they understood that the Board was not just a testing agency but their partner in the counseling function. They began realizing that the tests were sources of valuable information that, when interpreted correctly, would help students decide what and where to study beyond high school. By including junior high school (grades 7–9) counselors, the message was transmitted that counseling had to begin earlier. Also, bringing together college admissions officers from all the institutions and school counselors was in itself an accomplishment. One of the admissions officers made this perceptive comment in his report to his institution: "Coordination of future workshops and/or seminars should continue in the hands of an agency such as the College Board. It has proved to be an excellent "neutral" meeting ground for all those concerned." The College

Board had once more provided “neutral grounds” that facilitated intelligent discussion and a meeting of minds of people who very often were at odds with each other. Thus admissions officers from competing institutions and overworked school counselors buried the hatchet and focused on how to better advise their students.

Since the PRO resources were limited, a strategy of using materials prepared by the CBNYO programs was used. These materials, usually of very high quality, had to be translated or at least summarized in Spanish, to help counselors who were not proficient in English. In 1966, one such product was made available to the PRDoE, a film for use by counselors with students in eighth and ninth grades. Titled in Spanish “*No hay límites para aprender*,” it was spoken in English but had subtitles in Spanish. Several copies were donated to the Department’s Guidance and Counseling program and to each of the six educational regions. The film showed how and where to search for information about occupations and the importance of planning early what one wants to study in college and what the requirements were for different professions.

In 1966-67, the PRDoE established an Advisory Committee to recommend ways to improve the counseling and guidance program and to improve the professional advancement of high school counselors. The director of the PRO, Jorge Dieppa, was asked to chair the committee. Among the recommendations were to provide efficient ways of collecting student information for guidance and to develop better working relations between colleges’ admissions and counseling staff and high school counselors. There was some consideration given to the possibility of having a pre-PAA test for ninth and tenth grades. Several years later, after the continued insistence on the need for an instrument to support guidance from seventh to ninth grades, the PRO would develop the *Servicio para la Orientación Educativa* (SIPOE), which we will describe further later.

The Advisory Committee’s recommendations stimulated several activities to improve communications between college admissions staff and high school counselors. Colleges picked up the challenge and began inviting counselors within their region to meet on their campuses to exchange ideas and information. More often than not, the CBPRO was invited to make presentations during these activities. In 1967, the PRO joined with the Mayaguez Campus of the University of Puerto Rico in the first institute for counselors in Puerto Rico’s western region. The college’s admissions and counseling staff joined with Board staff in workshops on the use of tests in guidance, and the use of norms for interpreting test scores. In addition, a College Board documentary film “Going to School,” which presented students’ perceptions about school in real-life situations, was used as motivator for a discussion session.

To support the Department in its goal of improving classroom tests, the PRO conducted many one-day workshops during these years for hundreds of teachers throughout the island. In 1964-65 alone, there were 15 workshops. The use of ETS-produced filmstrips titled “Making Your Own Tests” proved to be an effective strategy to provide basic information on constructing tests to evaluate student learning. Also, staff from the Department were invited to the item-writing workshops held regularly since 1963 for maintaining the PAA and ESLAT item banks, and after 1966, for developing the Achievement and Advanced Level tests.

In 1968, the CBPRO joined the recently established ETS office in San Juan to conduct a six-week intensive training workshop for 32 selected teachers and evaluation supervisors. The Department’s goal was to have a team of well-trained test developers to strengthen its evaluation unit and who could later provide basic training in the schools. The training was organized in two three-week sessions, one in February and the other in June. The first session covered item writing and test assembly. By the end of the session, the trainees had assembled several tests that were administered in their schools. The second session focused on the statistical analyses of the items and how to use the statistics to improve the items and the tests. The teachers and supervisors trained in this project became the leaders in the Department’s efforts to improve evaluation of student learning for many years to come.

Parallel to these activities, the CBPRO and the Department began conversations about development of external evaluation tests to measure achievement at the end of the twelfth year and to certify the higher level achieved by the students participating in the special high school program in order to facilitate obtaining college credit. These conversations culminated in the most important project undertaken by the CBPRO with the support of the Department during the Foundation Years. We will examine this project in the next section.

Before moving on, however, a word must be said about the support provided by the CBPRO during these first years of operation to the Department’s goal of improving English instruction in the public schools. This was a recurrent problem since poorly thought-out policies to impose English instruction during the first half of the century met with failure because elementary and secondary school teachers could barely speak the language, and there were no resources to provide effective teaching materials, and because the vast majority of the population could do without

it. As it happened, many of the private schools directed by American religious orders became attractive to the elite because they offered much more effective English instruction. But after mid-century, with the development of Operation Bootstrap that brought many new manufacturing plants to the island, and the increase in opportunities for higher education, improving the teaching of English became more urgent. The K-12 curriculum was revised, university specialists in TESOL were appointed to direct the program, new textbook series were tried out, and summer institutes were conducted at the universities to train teachers. The CBPRO supported this effort in several ways. The most important support was, by far, the development of the ESLAT which was “requested” by the educational leadership when they agreed to use the PAA for admissions. Then there was the study by the Commission on English on the state of teaching English in the high schools, and the development of the Advanced Level course and test. This testing provided empirical information on how the students were performing in English after K-12, information that was analyzed and discussed with the Department’s English staff and teachers. Furthermore, the beginning of the Advanced Level course in English led to intensive teacher training that was repeated for many years.

In addition to the support described above, the CBPRO sponsored other activities. During Academic Year 1965-66, it sponsored two visits by Mr. Floyd Rinker, executive director of the CEEB Commission on English to meet with the ESLAT committee and consult with PRDoE staff on the local schools’ English programs. Following these visits, 11 films prepared by this Commission for supporting English teaching were made available to the Department to be transmitted via its educational TV station. Teachers in the school districts would meet to see and discuss the films.

As we can see, the CBPRO was rapidly becoming, within the first years of its inauguration, a major partner with the Puerto Rico Department of Education to support evaluation, strengthen guidance and counseling, and improve English instruction.

This partnership gave birth to a major project that was to have a substantial impact on Puerto Rico to this day, which will be explained in the following section.

2. Under a contract with the PRDoE three commissions of specialists are appointed (1966) to develop achievement tests and advanced level tests in Spanish, English, and Mathematics, and to conduct a study of the state of teaching in these subjects in Puerto Rico’s high schools.

The first major project with the PRDoE was the development of two sets of achievement tests in Spanish, English, and Mathematics begun in 1966. This was a most difficult undertaking technically, politically and financially. It could be argued that compared to developing an aptitude test, developing an achievement test is technically easier. But the goal was to develop five tests from scratch and revamp the original ESLAT, with three of the exams intended for earning college credit. The achievement tests’ objectives and specifications had to be broad enough to allow reliable measurements of a wide dispersion of achievement scores of students coming from very different schools: public and private; rural and urban; very poor and affluent; religious and nonsectarian. The exams for earning college credit had to meet the standards established by colleges with different curricular philosophies and admissions standards, ranging from selective to nearly open admissions.

When developing the PAA, the College Board had the strategic advantage of having created the SAT many years before. Most college faculty did not feel “attacked” or “menaced” by the aptitude tests. But achievement tests and college-level examinations were another story. These were subject-matter tests and professors and academic departments had traditionally held ownership of what was taught in college, and they were typically highly critical of the preparation the students brought from high school. Establishing subject content required bringing together specialists, each of whom defended a personal philosophy and concept of the subject or discipline. And then there were the college departments, which saw granting credit for courses taken in high school as an encroachment on their prerogative to establish subject content and standards and as a way to lose the better students in freshman courses. This latter fear was to be a major cause in the accreditation difficulties faced by the advanced level tests at the University of Puerto Rico Rio Piedras Campus.

The financial difficulties were also great. The fact was that the PRO could not fully finance the project and CBNY was not inclined to allocate any special amount beyond the assigned PRO budget that would cover the existing staff salaries and the office facilities. This meant Fortier had to find the money for the project’s direct expenses from other sources in Puerto Rico.

During 1966, there were a series of talks with the colleges' chief executive officers and some academic leaders to explore their willingness to collaborate and get their initial response to the project. A preliminary and confidential concept paper had been prepared by the staff for these meetings. In addition to explaining the purpose of the tests and the important information they would provide for the educational system and for the admissions process, the paper explained the need to integrate faculty members from the institutions and requested financial support. The response from the higher education leaders was mixed. They saw the benefits of the proposed tests for admissions and placement and were willing to collaborate but committed themselves only to in-kind contributions such as time off for the committee members and facilitating the pretesting activities. The response from the Department of Education was more promising. In August, a complete final proposal was sent to all colleges and to the Department. (ceeb/opr, "PROPUESTA para el desarrollo, construcción y administración de pruebas de rendimiento académico en español, inglés y matemáticas," August 18, 1966, 16 págs.)

The project's general purpose was to develop a system of standardized achievement examinations in Spanish, math, and English to measure and evaluate the levels of knowledge achieved in these subjects by the students graduating from the public and private high schools in Puerto Rico. The tests would address two clearly distinct levels of achievement. The minimum and maximum achievement in a given subject expected by the end of high school will be the basis for the Level I tests. The typical content achievement expected by the end of the college freshman year, in different degrees of excellence, will be the basis for the Level II tests. Later, the Level I tests were named the Achievement Tests (ACH) and the Level II tests were named the Advanced Level Tests. The mainland "Advanced Placement" (AP) (Advanced Placement® is now a trademark) name was not used to avoid confusion. Given the limited resources, the selection of these three subjects was dictated by the fact that they provide essential academic and linguistic skills necessary for successful learning in all other subjects in college and postsecondary studies. The proposal states that there was general consensus on these goals among educational leaders, but it stresses that development of the system required the commitment to participate and collaborate from the public and private colleges, the PRDoE, and the private schools. Once the system's objectives and the structure of participation were agreed upon by all the pertinent constituents, the CBPRO would accept the responsibility of managing the project and giving it continuity.

Several important educational outcomes were expected from both sets of tests: They will provide reliable and comparable information about individual and group achievement levels of students applying for admission to college; and adding this information to the PAA scores will improve the transition process. Also, it will be possible to identify students with very high achievement who should be recognized and given special attention at the college level; and the colleges will have more information for placing students in the appropriate courses including remediation courses. The schools would receive feedback for curricular revision and will be able to focus on weak areas because the tests will provide partial scores for discrete units of knowledge within each subject. And finally, the project will be a source of much experience in the systematic development and use of achievement tests that will be very useful for future development of a more comprehensive educational evaluation system with tests in other subjects and other grades.

The six proposed tests were to be developed following the same general methodology and psychometric standards used for the PAA but with some changes required by the different nature of achievement tests. A committee of examiners representing the educational community would oversee the process with the technical support of the PRO staff. The tests would be, for the most part but not exclusively, multiple-choice tests. The advanced level tests could possibly have open questions. Items would be written by college faculty and school teachers trained and supervised by the staff. All items would be subject to a strict revision process and pretesting. Testing time was set at one hour for each test which meant that the ESLAT had to be expanded to one hour. The Level II ACH tests, or advanced level, were to be at least two hours long. The development process continued the groundbreaking strategy initiated by the CBPRO in Puerto Rico for the *Prueba de Aptitud Académica* in 1963: bringing together staff from the Department and the institutions of higher education to work on a common project that would benefit both, and under the technical supervision and general management of the Board's staff.

Determining the content specifications was expected to be one of the most delicate and complex aspects of this project. Fortier was well aware of the academic power politics that could obstruct the acceptance of both of these sets of tests, particularly at the more prestigious and selective University of Puerto Rico campuses in Río Piedras and Mayaguez, and among the schoolteachers who were naturally apprehensive of external tests. To minimize the effect of possible negative reactions, it was decided to appoint three commissions made up of well-respected specialists and teachers, and to charge them with broader functions than the usual ones of the committee of examiners. The

name “Comisión,” in Spanish as in English, implied a higher level and greater prestige than “Comité.” In addition to being responsible for defining the general framework and the content specifications for its assigned subject test, each commission was also charged with reviewing and evaluating the current state of high school teaching in the subject, including curriculum, instructional materials, and methodology. Their observations, findings, and interpretations would provide important input for defining the test specifications, would help explain the achievement test contents, and would provide an empirical base for the advanced level course objectives. It was also expected that they would make recommendations for improving the teaching of the three subjects in high school and for better integration between the subjects and the college freshman courses.

The proposal established the criteria for selecting the members of the three commissions. Although institutional representation and pedagogical diversity were important, recognized competence and availability to engage in a two-year assignment were the primary criteria. When selecting the commission members, it so happened that a majority came from the University of Puerto Rico, joined by a minority of equally respected professors from some of the private universities. The commissions were completed with program directors from the central administration at the Department and some public and private schoolteachers. Three most distinguished specialists were selected to lead the commissions. Dr. Jorge Luis Porras Cruz, from the University of Puerto Rico at Río Piedras, chaired the Commission on Spanish; Dr. Adela Méndez, Director of the English Program at the PRDoE and Professor of English at UPR Río Piedras, chaired the Commission on English; and Dr. Eugene A. Francis, Professor of Mathematics at the University of Puerto Rico Mayaguez Campus, chaired the Commission on Mathematics. Professor Héctor Delgado Ruíz, from the Secretary of Education’s staff was the executive secretary for the three commissions.¹¹

Before the project could begin, the financial support had to be secured. The estimated cost for each of the two development years was \$100,000, which included organization and functioning of the commissions; test development and construction; production and printing of booklets and administration materials; and test administration, scoring, and reporting. As we have seen, no hard monies were coming from the colleges. Fortunately, Dr. Quintero-Alfaro had been appointed secretary of public education in 1965, and he was fully committed to having the achievement tests as a source of external evaluative information. He also wanted to extend the program for the most able students. So it was the PRDoE who came up with the hard money needed in the form of a contract signed between September and October by which the CBPRO received \$50,000 for two consecutive years in exchange for examining free of charge all high school seniors who registered for the PAA and ESLAT, and providing several statistical reports of public school students examined, distributed by school, sex, and age as well as comparative analyses with relevant variables. The Board also agreed to provide technical support for related studies the Department would want to make based on the tests’ statistics. Since the free examination for public school students, and the reports, were services that the Department received, ownership of the tests remained with the College Board as well as the responsibility to maintain and update the tests. This arrangement was specified in the contract signed with the Department. The proposal stated that after the first two years, an additional fee would be charged. But for the time being, the available income for development of the tests would be limited to 50 percent of the estimated cost. And with no income from fees available, the CBPRO had to cover the remaining expenses from its operational budget with some support from the NYO. As when the ESLAT was added to the PAA in 1963, the staff had to do more with a limited budget.

The Advanced Level Tests merit additional explanation because they gave way to a program with a difficult history. These tests were intended to measure achievement levels comparable to that of a college freshman at the end of a full year of instruction in Spanish, English, and the typical freshman math course. This would require the commissions to make a rigorous evaluation of the state of teaching in these subjects and the achievement levels actually reached by the typical college student. It was expected that close to 10 percent of the students who take the PAA would take the exams. These would be the top students in the senior class. Schools were to prepare students though one of three suggested strategies depending on the available resources: Regular group courses when the number of students makes it possible; special groups for a small number of students; and teachers tutoring one or two students.

11. List of the other members of the commissions. **Spanish:** Manuel Álvarez Nazario, UPR Mayaguez; Mariana Robles de Cardona, UPR Río Piedras; Laura Gallego, UPR Río Piedras; Carmen Lugo Filippi, PRDoE and UPR Río Piedras; María Teresa Babin de Nieto, UPR Mayaguez and PRDoE; Ramón Pagan Maldonado, UPR Regional Colleges; and María Santos de Serralta, St. John’s Preparatory School. **English:** Teresa Monsanto de Cajigas, PRDoE; Sister Mary Fabian, O.P., Catholic University; Mildred Friedman, UPR Río Piedras; Eugene V. Mohr Inter American University at Hato Rey; Sister Joseph Theresa, O.P., high school teacher at Academia San José; and Nellie González de la Torre, high school teacher at Escuela Superior Antonio Sarriera, and later, UPR Río Piedras. **Mathematics:** Enrique Bayó, UPR Río Piedras; José L. Garrido, Colegio San Ignacio; Sixta María Rodríguez, high school teacher at Escuela Superior Gautier Benítez; Sylvia Silva, PRDoE; Sister Mercedes Soltero, C.a Ch., high school teacher at Colegio Vedruna.

The commissions were asked to prepare the course syllabus with the minimum essential content, but with alternative reading materials, to allow the teachers flexibility. Content would be open to changes as the program accumulated experience. The CBPRO would be responsible for sponsoring workshops and seminars with college faculty and high school teachers to stimulate curricular revisions, exchange instructional strategies, and discuss academic issues in the three subjects.

It should be noted that the concept of teaching college-level courses to talented students in high school was not totally new in Puerto Rico. As a matter of fact, a few private schools were participating in the national College Board's AP Program, and the University of Puerto Rico and the state Department of Education had been collaborating in two different experiments aimed at teaching college content in public high schools.¹²

The oldest experiment, begun in the fifties, consisted of college professors from the UPR teaching four courses from the General Studies Core Curriculum in nearby high schools. The courses taught were Spanish, English, Social Studies, and Humanities (Western Civilization). The course contents, methodology, exams, and standards were the same as in the university. The program was successful in that it proved that the top high school students could handle college freshman courses with passing grades comparable to those of college freshmen, and sometimes even better. But although some of the students, those with higher grades, were placed in honors courses upon admissions to UPR, no academic credit was given. This lack of a tangible incentive, added to the many bureaucratic obstacles at both ends, and the extra cost the university was assuming, worked against the extension of the program beyond three or four schools.

The other experiment began in 1961 and was much more ambitious, as it attempted to provide in the four high school years (9–12) an education equivalent to the traditional high school curriculum plus one year of the general studies core curriculum required of all students at the Rio Piedras Campus. This “special high school program” was itself one part of a three part project which included teacher training and in-service professional development and was funded by a Ford Foundation Grant.¹³

The evaluation report was prepared by the then Under Secretary of Education, Pedro José Rivera and submitted as a doctoral dissertation at the University of Chicago. Again, it was confirmed that above-average high school students could successfully handle a much stronger curriculum and achieve at levels similar to college freshmen. Dr. Rivera suggested that this should lead to a revision of the General Studies requirements and to granting advanced placement to the students.¹⁴ Unfortunately, this generated opposition from the General Studies Faculty. This was a freshman-year college with a strong philosophical and methodological orientation that had been the curricular backbone of the university reform of the forties as an antidote to what was perceived as the dangers of specialization. They felt that their courses, academic environment, and multidisciplinary approach could not be replicated in high school, and saw advanced placement as a way of losing top freshmen to specialized faculties. Perhaps there was also a nonverbalized fear of eventually becoming a “remedial program.”

As it happened, a change in government brought a new administration to the Department in 1969, and the two experimental programs were discontinued on the grounds that more resources were needed to improve education for the majority of students and that maintaining the programs for the top 10 percent was too expensive. Paradoxically, this made it easier for the Advanced Level program to establish itself in its first phase with the English, Spanish, and Math exams. The new administration soon understood that in a crowded and extremely bureaucratic public high school system, an advanced placement program was a very economical and effective strategy to encourage and

12. As a young college instructor at the UPR Faculty of General Studies, I had the opportunity to participate as teacher and consultant in both experimental programs during the early sixties.

13. The substantial curriculum reform had two major goals: (1) Understanding of human culture and the intellectual tools employed by humans in creating culture, and (2) Understanding the natural world and the intellectual tools of scientific inquiry. To achieve the first goal, a seminar in Humanities was required for the duration of the program in which students and teachers discussed original readings from the great books of Western Civilization. These seminars were initially conducted by college professors with the participation of high school teachers of history and social studies who also received special sessions of in-service training. To achieve the second goal, the project integrated the recent curricular materials developed nationally for science teaching that emphasized the scientific process and mathematical reasoning. As it has already been reported, the CBPRO was asked to participate in the evaluation of this project, providing experimental forms of the PAA and technical assistance to the Department. Fortier rightly understood that this reform was relevant for any future attempt to develop an advanced placement program in Puerto Rico.

14. See Pedro Jose Rivera, *General Studies as Preparation for College Work*, Department of Education. Commonwealth of Puerto Rico, 1966.

recognize their better students and teachers. The Department later negotiated with the Board to pay for the exams on a student by student basis. At UPR the three courses were given credit even if halfheartedly. As we shall see, 10 years later when an attempt was made to expand the program to include the other core curriculum courses, the opposition was rekindled and granting credit was denied to the four new courses that eventually were discontinued.

This is not the place to examine in any detail the three commissions' reports, but because of their importance, a brief interpretation of their methodology, findings, and recommendations cannot be avoided. The three commissions worked in very similar fashion. They analyzed the existing curriculum, the history of curricular changes and previous studies, the textbooks and teaching materials; they visited some classrooms to observe teaching, and they interviewed teachers, regional supervisors and central staff responsible for their assigned subject. All of the commissioners had ample teaching experience, many of them in high school and college, so this personal knowledge undoubtedly had some input into their interpretation of the situation. The three commissions disclaimed the preliminary and incomplete nature of their research and recommended that a K to 12 complete study of the teaching effectiveness in Spanish, English, and mathematics should be conducted, with more resources to collect and analyze information on the different variables affecting achievement.

The major findings were in many ways similar across the three reports. The curriculum was not properly articulated within the high school and with colleges; more often than not, students were being given the same courses when there were some who could be challenged more; the academic preparation of many teachers was not adequate; teaching was uneven, sometimes dull and routine, but there were many good teachers who taught with creativity and stimulated learning; evaluation needed to be improved; books and materials were not always available. Beyond these common findings, each commission made specific findings and recommendations.

The English Commission's major concern was with the academic preparation of teachers of English in the public schools. While acknowledging that the majority of teachers had a great sense of responsibility and dedication, the commission thought that they needed more preparation in teaching English as a Second Language skills. The commission called on the teacher preparation programs to modify the curriculum to give more courses on language development as differentiated from pure literature. Similarly, they called on the PRDoE to have more in-service training throughout the year. And they recommended that teaching of English should be in the hands of specialized teachers from the primary grades up, that recruitment in the States should be considered, and that standards for English certification be strengthened.

The Spanish Commission formulated strong objections to the existing curriculum, which lacked thematic and chronological continuity in its literature dimension as well as systematic and progressive sequencing for teaching grammar. The commissioners also questioned the poor selection of many readings and the superficial literary analysis that prevailed. There were no diagnostic language tests on which to plan the teaching of grammar in the high school. Teachers, in general, had no deep knowledge of the integration of literature and language and were teaching these in a disconnected fashion. The commission made an urgent plea to the University of Puerto Rico to take an active lead in revamping teacher preparation.

The Mathematics Commission acknowledged that since 1961 a modern mathematics approach was being used experimentally in many schools, and that there had been teacher training in the approach but still no substantial change in the mathematical knowledge and performance by Grade 12, as the results in the first form of the achievement test showed. The test was too difficult for the average senior. The commission recommended that college admissions requirements in mathematics must be increased so that beyond algebra and geometry most students get trigonometry and advanced algebra, as many of the private schools require. In college many of the math courses are remedial due to the low achievement levels of new students. The commission recommended that the high school curriculum offer two distinct tracks: one general track for students going on to liberal arts and education studies, and a "scientific" track for students going on to science and engineering majors. This track should include at least elementary principles of calculus. Then the science and engineering programs could begin with a good calculus course instead of having to spend time bringing students up to precalculus level.

Finally, it should be noted that the three commissions agreed that there were students in both the private and the public schools who could benefit from advanced level courses that were equivalent to the existing core curriculum college courses. The teachers for these advanced level courses should be carefully selected from the best high school teachers and receive continuous in-service training and contact with college professors. These three commission reports were published, distributed to the educational community, and soon became highly recognized contributions

to a better understanding of education in Puerto Rico. What real impact they had is difficult to assess as the difficulties faced by the public schools and the frequent changes in the direction of the Department made continued improvement almost impossible. But their findings and recommendations did provide expert input toward making the achievement and advanced level tests more responsive to the realities of education on the island.

3. The PRO adds achievement tests (1967) in Spanish and Mathematics to its initial admissions testing package, and pilots the Advanced Level program of courses and examinations (1967-68).

While the Achievement and Advanced Level tests were being developed, the CBPRO undertook many initiatives to inform the educational community about the tests' development process, and the dates for the first administrations, as well as to prepare counselors, teachers and principals for the tests' debut. It was important to create a climate free of anxiety by providing as much information as possible to all those concerned. In January 1967, the PRO began publishing a newsletter named *Academia*, and this became a medium for getting information about the new tests to all the schools and colleges. In addition, many meetings, workshops, and presentations at educational conferences were used for this purpose. The Achievement Tests' objectives, and a general description of the contents and sample questions were discussed in these meetings and distributed to the schools. These tests presented less of a challenge because, unlike the Advanced Level tests, they were not dependent on a special course.

The two new Spanish and Math Achievement Tests were administered for the first time on November 18, 1967. As planned, it was a full day of testing: In the morning, the PAA and ESLAT were given, Spanish and Mathematics were given in the afternoon. Some special arrangements were made to accommodate the expanded testing. The Department ordered the school cafeterias to serve lunch for the students. Honoraria for the teachers working as proctors, test center directors, and other contracted staff had to be adjusted to pay for the additional time. The administration ran smoothly with no major problems reported and only minor delays in returning the test booklets, answer sheets, and administrative materials to the PRO headquarters.

Scores for the Achievement Tests were reported in a standardized 200–800 scale identical to the one used for the PAA and ESLAT. General reports and statistical analyses were prepared and sent to all colleges and the PRDoE. Each college was free to use the scores as it saw fit and to develop norms to integrate the scores in to its admissions and placement process. The PRO agreed to conduct research to establish predictive validity and to collaborate with institutions conducting their own studies to determine best use of the scores. Both types of studies should provide the empirical basis for determining each institution's policies concerning the use of the test scores, particularly for placing students in the most appropriate freshman course.

The Advanced Level tests, related as they were to teaching college-level courses, required different and more intensive organization. During the second semester of 1966-67, several meetings were held with Department of Education supervisors, superintendents, and principals to provide orientation on the program and explore the possible sites for piloting the courses. The participating schools were selected because they had adequate facilities; principals willing to accommodate the courses by making special arrangements in class schedules and teacher assignments; and teachers recognized for their excellence and willingness to take on a more demanding teaching responsibility. The commissions conducted two-week workshops on each subject in June 1967 for teachers and principals from the selected schools. In addition to general orientation from the staff, faculty from several colleges made presentations and conducted discussions on course contents, the syllabus, textbooks, and teaching techniques. As an additional support for teachers, sample exams were prepared that the teachers could use for evaluation or for giving the students practice with different types of questions.

Meetings were also held during this period with college Spanish, English, and Math department chairs to keep them informed of the progress in the development of the Achievement and the Advanced Level tests, and to discuss the findings of the three commissions. But obtaining consensus on advanced placement was not coming easily. Even after the pilots began, Fortier reported: "There is still need to get consensus among the local colleges and universities," but he felt that advanced placement and, in most institutions, college credit, would be granted immediately to the best candidates. As a matter of fact, in 1968 all colleges agreed to grant credit to students.

The Advanced Placement Program® was piloted in Academic Year 1967-68 in 32 high schools, of which 17 were private and 15 public. There were 74 teachers in charge of the pilot groups, and a total of 1,029 students were initially registered for the courses, but 710 took the exams in May 1968. The three-hour examinations included multiple-choice and essay questions, and demonstrations in Mathematics. The exams taken were distributed as follows:

213 in Spanish, 169 in Math, and 328 in English. A group of readers for the essays in Spanish and English and the Mathematical demonstrations was trained with the support of consultants provided by the NYO. Simultaneously with the high school students, a sample of 400 students taking the same courses in colleges also took the exams. Their scores were used to norm the scores of the high school students. Scores for the Advanced Level tests were reported on a 1–5 scale and sent to all colleges indicated by the student. Each college determined its rules for granting credit with some accepting a minimum score of 3 and others a minimum of 4.

In May 1969, 1,020 students took exams, as follows: 347 in Spanish, 410 in English, and 263 in Math. The number of participating schools also grew: 25 public schools and 17 private. All growth was in the public schools, which were 15 the first year. The Mayaguez campus of UPR lowered the score for credit to 3 in Spanish and English.

4. Consolidation of the PAA and Achievement Tests. Higher education begins to expand. New services, activities and publications developed in support of the original and new programs: validity studies; workshops for counselors and admissions officers; the newsletter *Academia*; workshops on evaluation and test construction; workshops on item writing; Nelson's study of financial aid at UPR; bulletins of information and study guides; and others.

During its second year (1964-65), the admissions testing program tested a total of 14,928 students, a 19.5 percent increase over 1963-64. During the remaining years of the decade there was continued growth, having achieved 21,987 by 1968-69, a 78 percent growth rate over 1963.

This growth reflected several related socioeconomic developments. The modernization process of Puerto Rican society begun in the previous decades was creating demand for more college-trained personnel in management and public administration, commerce, education, social services, and new two-year careers. This demand was growing faster than the capacity of the state university to absorb it on its two campuses in Río Piedras and Mayaguez. From 1958-59 to 1963-64, the high school graduation rate increased from 14,639 to 20,392, almost 40 percent, whereas the number of students admitted decreased from 29 to 26 percent. Frank Bowles had anticipated that this would happen in his study for UPR in 1954 and had advised beginning development of regional junior colleges to absorb the coming demand, but at that time the university was engaged in developing new professional programs, including a medical school and research facility. Thus, in the early sixties, the university faced the dilemma posed by Bowles: increase selectivity or expand opportunities. Unreasonably raising admissions standards to keep students away was not politically and socially acceptable, so the expansion process began. From 1962 to 1969, four new regional colleges were established: in the eastern city of Humacao (1962); in the north central city of Arecibo (1967); in the mountain range municipality of Cayey (1967); and in the southern city of Ponce. By the end of the decade, the University of Puerto Rico was operating across the island's major geographical regions. The new units offered an associate degree in short careers and transfer programs. Soon this expansion would allow the university to remain highly selective on the two main campuses and at the same time respond to the increasing demand.

It must be remembered that the sixties were a period of increasing turbulence in universities worldwide as students became active defending many causes. Puerto Rico was no exception. During this same period, faculty and students at the UPR began a movement for reforming the university and getting the legislature to write a new University Law. There were multiple, and often conflicting, objectives from different sectors of the university community, as well as the legislature and the executive branch. The faculty and students were for increasing their participation in decision making, reducing the power of Chancellor Benítez, and granting autonomy to the individual campuses. Some sectors were for expanding the university; others feared expansion would bring down quality and leave graduate programs and research without much needed resources. The administration wanted to retain as much centralized direction as possible in a multicampus system with limited autonomy and mild forms of participation for faculty and students, arguing that the Latin American model of co-government would endanger the advancement of the university.

After an agitated legislative process, a new University Law was approved in 1966. It created a system with three main campuses: Río Piedras; Mayaguez, a new Health Sciences Campus located in the Puerto Rico Medical Center in Río Piedras; and an Administration of Regional Colleges. The latter was charged with administering the new colleges being established throughout the Commonwealth. Each campus and the Regional Colleges unit was given increased but not complete autonomy, a complete management hierarchy headed by a chancellor, and academic and administrative structures with increased faculty and student participation. A System Administration was established headed by a president and charged with coordinating the system, including final budget determinations. The law also revamped the Superior Council of Education, transforming it into the Council of Higher Education with

double functions as the governance board overseeing the state university and the licensing agency for private higher education.

The private sector also began expanding. In 1962, Antillean College, a Seventh-Day Adventist institution, was licensed as a new institution in Mayaguez, and the Catholic University, based in Ponce, established a two-year college in Bayamón, a rapidly growing municipality in the central north. The same year, Inter American University, whose campus was in San German in the west, established a campus in San Juan; and the Puerto Rico Junior College expanded its facilities to a second site in Rio Piedras and established a new unit in Gurabo to serve the rural towns in the Turabo Valley and the eastern mountain range.

The increased traffic from high school to higher education was creating many difficulties. More applicants meant more students with diverse backgrounds and wide differences in academic preparation and skills. In order to provide the best information possible to the colleges, the CBPRO gave priority to the admissions testing program, renovating the test committees, training more item writers, developing new forms every year, conducting validity studies and other relevant research, making available new or updated publications for the students, and near the end of the decade, developing the Achievement and Advanced Level tests, which we have previously described.

A second committee of examiners was appointed in April 1964. In an early move to cut costs, the ESLAT Committee was discontinued, but ESL specialists were appointed to the PAA Committee that assumed responsibility for both tests. Returning from the first committee were the Chair Augusto Bobonis and Julian Stanley from the SAT Committee. New members were Ethel Ríos de Betancourt, dean, Faculty of General Studies, UPR Río Piedras Campus; Juan A. Rivero, dean, Faculty of Arts and Sciences, UPR's Mayaguez A&M College; Prof. Silvia Silva, director of Mathematics Program, PRDoE; Adela Méndez, PRDoE, and expert in the teaching of ESL; and Edgardo Sevilla, mathematician and vice-chancellor of the University of Honduras. From the ESLAT Committee, Sister Mary Immaculate was appointed to the new integrated committee.

While the committee of examiners was working on the third form of both tests, to be used in November 1965, the PRO staff was conducting item construction workshops, training college and high school teachers with a twofold purpose: to create a cadre of item writers for its tests and as a way of strengthening test construction in the schools and institutions. This training activity in item writing and test construction continued every year in order to maintain a good bank of items and have new test forms. Work soon began on the achievement and the advanced level tests.

The PAA Committee for the new academic year 1967-68 had a somewhat novel configuration. Two members from Latin America, Luis Arocena from Universidad de Buenos Aires but visiting professor at the University of Texas, and Jorge Zagarra Vernal, professor at Universidad Central de Venezuela. For the first time, a local high school teacher was appointed to the committee: Margarita de Boada, teacher at the Escuela Superior Einstein public high school. Finally, the committee featured a member of the SAT Committee, Professor Carl Bereiter, of the University of Illinois.

In order to achieve the consolidation of the testing programs it had created during these foundation years, the PRO staff engaged in an intensive research activity. In 1966, validity studies for the first group of students examined in 1964 had very satisfactory results that were shared with the academic community. Jorge Dieppa presented the results to the annual meeting of the Psychologists Association on October 11, 1967, at the University of Puerto Rico. Findings were very similar to those obtained for the SAT and provided evidence that for the local institutions, the PAA was a useful predictor when combined with the high school average. Additional studies were conducted with a new sample of students who had completed their first year in college in 1966. Other studies were begun on the effects of review courses on the scores and the salient characteristics of students graduating from high school. A future study of students' institutional preferences and its possible relation to freshman year grades was being planned.

During the final years of this period, the PRO strengthened its publication program. The student Bulletin of Information for the PAA was revised, adding more practice items. A modest Guide to College Studies in Puerto Rico was published and distributed free to students registered for the SSAT. The memoirs of the precollege guidance seminars held in April 1965 were also published and distributed free to 300 counselors and to high school principals. But perhaps the most important new publication was the *Academia* newsletter that was launched in 1967 as an occasional publication but which later came out regularly every four months. Under the able direction of Jorge Dieppa, the newsletter soon became the most efficient way to communicate important news about the PRI programs, activities, and future plans because it was distributed to all schools and colleges, as well as to educational leaders. It also carried a Q&A section where questions from readers would be answered.

As we have seen, from 1963 to 1969, the College Board's Puerto Rico Office established itself as a major force in strengthening admissions policies and practices in Puerto Rico and several Latin American countries. Near the end of the Foundation Years period, it was already moving into new programs and services in a fruitful collaboration with the Puerto Rico Department of Education. In Part Two we shall see that the work and influence of the PRO continued to grow even as it faced new educational and financial challenges.

II. The Pains of Growth and Early Maturity: 1969 to 1987

During these 18 years, the Puerto Rico Office grew both quantitatively and qualitatively. New programs were developed to serve important educational needs beyond admissions testing in Puerto Rico. Support for counselors and their schools, and for admissions officers and their institutions, multiplied. More students and their families were impacted by CBPRO's assessments, by the guidance program and related activities, and by new opportunities created for talented students to advance in their studies. The PRO staff was very active in training the educational community to use the information about individual students, the schools, and the educational system as a whole, which was now available to all through the Office's programs, reports, and increasing research. In Latin America, important universities became users of the PAA and received support to reform their admissions policies and practices. In some cases, technical aid was provided to develop national testing programs. The College Board's image and recognition in the Hispanic world was enhanced enormously through the Puerto Rico Office's work on the island and beyond.

But this growth did not come easily, and it was not devoid of serious difficulties and situations that endangered the Office's very existence within the College Board organization. In this section, we will describe the new programs and their contributions to education, and we will examine the major difficulties faced by the Office, all of which had to do with achieving an always elusive financial self-sufficiency. It is important to leave a record of these ups and downs, of the almost permanent subsidy provided by the CEEB, and of the struggles to become self-supporting. For reasons not fully clear, this inside story was not made public, except to a few educational leaders who were very close to Adolfo Fortier. Therefore the external perception was one of financial well-being if not a prosperous organization from which you could always expect more free services to benefit education.

A. The CEEB appoints a Planning and Evaluation Committee (1969) to review the PRO's achievements, maximize use of its resources, and recommend priorities for the next five years.

1. The nature, purposes, and composition of the Planning and Evaluation Committee. The CEEB begins to worry about its investment in the PRO, its finances, and how to best use its limited resources.

In March 1969, the College Board appointed a Planning and Evaluation Committee to review the operations at its Puerto Rico Office and establish priorities for the following five years. Six years had elapsed since its foundation as an experiment and less than five years after it had become a regular College Board program. George Hanford, at the time, Acting CEO of the Board, chaired this committee which included four members from Puerto Rico and one from the States. Apart from the good administrative practice of periodically taking stock of the accomplishments and weaknesses of any organization as a basis for planning for the future, in this case there was a more specific situation worrying the New York Office.

The fast pace of growth of tests, programs, and services provided by the PRO in Puerto Rico and to a lesser degree in Latin America had not produced a corresponding increase in income to offset expenses. Bowles's premonition of the merit of providing "public service," even if losing money for some time, was becoming a continuing reality. But as Hanford said in the Committee's Report, "the Board's development of an organization and activities in Puerto Rico has so far involved a net expenditure of over one-half million dollars [and] it seems unlikely that the Board can justify to its constituency any substantially larger rate of net investment in Puerto Rico than that of the past few years." (Hanford, Report, 1969, Page 1.) Obviously much of the work accomplished was made possible by the national office subsidizing the operation in Puerto Rico.

The PAA and ESLAT, as such, had been increasing in volume consistently during the six years and by 1968-69 it had increased 78.4 percent over the first year, as we saw in the previous chapter and the rate of high school seniors taking the tests was very high, but the base population was, and would always be, small. This meant that even when by the end of the seventies, the rate of high school seniors taking the admissions tests was higher than the rate of seniors taking the SAT in the States, the program did not achieve complete self-sufficiency and had to frequently increase the test fees in relatively large increments. One must conclude that the need for the continuing subsidy was the result of several factors: the additional cost of developing ESLAT while maintaining the same fee budgeted for the PAA; the difference between the estimated cost of the new Achievement and Advanced Level tests (\$200,000); and the

income from the Department of Education grant/contract (\$100,000); the many services provided free in Puerto Rico to colleges and schools as part of the goal to create a testing culture and establish the PRO as a partner of the educational community; and the increasing activity in Latin American with little income return.

The establishment of an ETS office in San Juan in 1968, with the purpose of supporting the PRDoE in the development of tests and other assessment instruments, and to conduct experimental work for a Spanish version of the GRE, must have been another disturbing factor. Even though a very close working relationship already existed between the CBPRO and the Department, it is evident that ETS saw the possibility of additional testing work in areas outside the College Board's mission. Since ETS had twice rejected the College Board's overtures to join forces in Puerto Rico, and we have not found any reference to the contrary, we assume that ETS did not consult the Board about the venture. A few years later, the idea of a merger was again considered but, as we shall see, did not prevail, and eventually ETS closed its test development work in Puerto Rico, leaving only support staff to handle student registration and administration of their *Prueba de Admisión a Estudios Graduados* or PAEG (the Spanish GRE) and the College Board's SAT, PSAT/NMSQT, and AP.

Evidently, evaluating the situation in Puerto Rico was being discussed in New York during the last quarter of 1968. In the Annual Report for 1967-68, normally submitted in July-August of the following fiscal year, Fortier acknowledged it was time to evaluate the operation and priorities in Puerto Rico. He then explained the peculiar situation of the island's public school system, which made the operation of the PRO quite different from the operations in the mainland offices and programs. The island's schools need more direct services, but they lacked resources to pay for many of them. The Department had been contracting some services with the PRO, but its budget was limited. The Planning and Evaluation Committee was, therefore, a good and needed instrument for critical evaluation of the work accomplished and to set the future course, even if one finds certain uneasiness in some of the reports and writings from Fortier and Dieppa.

In addition to its chair, the committee included four distinguished education leaders from Puerto Rico and one from the mainland. These were Dr. Ethel R. Betancourt, director of the Office of Academic Affairs, University of Puerto Rico System; Sister Mary Byles, academic dean, College of the Sacred Heart; Dr. Charles O. Hamill, director of the Office of Educational Research, Department of Education; Ana G. Mendez, president, Puerto Rico Junior College; and Dr. Clyde Vroman, director of admissions at the University of Michigan. This was indeed a blue-ribbon Committee. All major College Board constituencies in Puerto Rico were represented by well-known people. Additionally, it was reported that three staff members would support the Committee's work: Vice President for International Education, Albert Sims; Executive Director for Latin American Activities, Adolfo Fortier; and Director of the PRO, Jorge Dieppa.

In a prefatory note to its October report, the committee was charged: "to recommend priorities for CEEB services and activities in Puerto Rico during the next five years, taking into consideration, critically, what has been accomplished during the first five years since...1963." (Committee Report, 1969, Page 1).

A number of broad questions were identified as issues about which the Committee would attempt to elicit representative views from the educational community of Puerto Rico. What are the most urgent problems faced by secondary and higher education in Puerto Rico? How can the College Board participate in solving them? Which of the existing College Board programs should be strengthened? Which ones should be reduced or limited? What new programs are needed in Puerto Rico? What participation have we had and should have in the future concerning guidance programs and financial aid programs in Puerto Rico? This was, of course, a big agenda, but the committee was able to come up with a clear picture of the situation on which to base its recommendations.

The committee had its first meeting in April 1969, but for the prior several weeks, Fortier met with leaders of higher education institutions and the PRDoE to explore their views on the aforementioned questions. There is little information available about whom the committee heard or how many meetings the committee held, but six months after its designation, on October 10, 1969, a Committee Report was made public, addressed to 'The Educational Community of Puerto Rico.'¹⁵

15. It should be noted that the finality of this October 69 report is in doubt because we found in the 1969-70 annual report that the final report was expected before July 1970. Also, reference is made to the Committee meeting twice in Puerto Rico, but we found neither the other report nor any reference in the October report as to its being preliminary. However, in *Academia*, #10, January 1970, reference is made to the October 69 report as a "first report," and the major recommendations are published with a request for reactions from the educational community. And in *Academia* #11, May 1970, reference is made to a last meeting held in March 1970.

2. The Committee's report: The nature and mission of the CEEB. Description of the major characteristics of Puerto Rico's education system in which the PRO operates and the system's critical needs.

In their meetings with other members of the educational community and in the internal discussions they had as a group, the committee reached consensus on the general salient characteristics of the educational situation in Puerto Rico near the end of the sixties. These characteristics defined the environment in which the CBPRO had been operating, which would probably remain essentially unchanged for the following five years.

At the K-12 level, public education was free and increasingly available throughout the island. Management of the public school system was highly centralized, including a prescribed common curriculum. Private education was mostly church related and, on the average, of higher quality than public schooling. Of the 16–18-year-old age group, 70–75 percent of the students were attending high school, while 30 percent of the 18-year-old cohort graduated from high school. Of the approximately 35,000 who graduated from all public and private high schools, 21,000, a very high 60 percent, took the PRO admissions tests in 1968-69, and about 8,000 gained admission to college. There was not much information about what happened to the others.

A general goal of the Commonwealth was to develop differentiated postsecondary educational programs relevant to Puerto Rico's needs for trained resources of different levels. This would require increasing the technical institutes and two-year colleges, expanding four-year programs, and strengthening professional and graduate education. But the committee found no systematic analysis of student profiles and interests which could serve as a rationale for developing the system. The multicampus State University of Puerto Rico was the dominant institution, serving about two-thirds of all students. It was more selective and generally recognized as having more rigorous academic requirements. Its tuition was very low compared to the private institutions. In the private sector, there were six institutions of different sizes but most of them were growing. The Council of Higher Education was both the governing board of the state university and the licensing agency for private higher education. There was wide consensus in the educational community that a master plan for higher education was urgently needed.

Some financial aid was available in both public and private institutions. Most of the aid came from public funds assigned by the state legislature and distributed through the council. But there was no comprehensive study of financial aid need and no uniform system for the allocation of aid to students.

The committee also found evidence of a serious problem of articulation between high schools and colleges, even as the CBPRO programs were facilitating more communication between the two levels. There was general agreement that the CBPRO's PAA, Achievement, and Advanced Level tests had been developed with the participation and support of the higher education institutions and the PRDoE, and that they had substantially improved the admissions and placement process. This was acknowledged by all institutions even if each used them differently. On the other hand, it was also evident that the transition to college process was still in need of improvement and that all the parties concerned looked to the College Board as a key player in bringing about this improvement.

3. The Committee's report: A Plan emerges with seven specific priorities to maintain the role of the PRO and develop new services in the following five years.

The priorities recommended by the committee for the following five years were based on the findings we have summarized. These recommendations were submitted to the College Board with this qualification: "[T]he Committee recognizes that the College Board must make management decisions within the limits of resources for Puerto Rico, as perceived by the management of the College Board." (Committee Report, 1969, Page 6)

Generally speaking, there were no surprises in the seven recommendations put forward by the committee. Most of them had been anticipated by Fortier in several presentations and reports of the preceding years. In keeping with the short length of the Report, the recommendations were stated in brief and general terms, with indications of relative priority. Little was said about how to implement them, and no specific time frame was given. Strictly speaking, it was not a complete plan; it was more like an agenda identifying the areas in which the PRO should focus its work, some of which were urgent and others that could wait, plus a general guideline on partnerships to help fund the proposed new work.

Two areas were assigned "**very high priority**": the PAA and guidance. The top priority was to maintain and improve the PAA to the best extent possible, so as to preserve its role as the most effective admissions instrument for all

institutions. Developing new programs to strengthen guidance in the schools also received first priority status. Acknowledging that the Board had done little in this field in Puerto Rico, the committee said: "A guidance program that involves work with counselor-educators, training for practicing counselors, and communications directly with students is likewise of first-order importance." This was necessary if the island is going to diversify postsecondary options and more students seek further education after high school. The recommendation included several suggestions on possible guidance instruments, such as, a biographical inventory, an interest index, college profiles, and the types of measures used in the CEEB's Comparative Guidance and Placement Program. On the other hand, the committee specifically came out against developing a Pre-SAT type test in Spanish, an idea that had come up in meetings with counselors and that had some staff support.

A second level of recommendations identified as "**high priority**," included three areas: gathering student information, developing a system for evaluating student financial needs, and placement testing. The committee had found that information on students was not systematically gathered and analyzed in the public schools. This was an obstacle to planning at all levels. The recommendation was to work with the Department of Education to develop "a modest research-intelligence function" to assemble, analyze, and report information about the students. Aware that the expansion of access to postsecondary education would be seriously limited without financial aid, the committee recommended that the PRO participate in the development of a comprehensive system to evaluate student financial need and to implement equitable distribution of available aid. Continuation of the Achievement Tests in Spanish, English and Math was fully endorsed to support adequate placement, with the additional suggestion that they should be extended to other fields of study. Within this same category but just below the achievement tests, the committee ranked the Advanced Level examinations, acknowledging that even though they served a small number of students, they had much potential for improving the quality of teaching in the schools and promoting better articulation between the high school curriculum and college.

Another area identified as high priority was of a different nature. It did not involve working with tests or developing new programs like the first five. The committee was convinced that a master plan for higher education was badly needed, and it was of the opinion that the College Board should be available to support developing such a plan in a consultative role.

Very little was said about how to move ahead to conduct the work required to implement the recommendations presented to the Board by the committee. But in its last recommendation, the committee endorsed a general strategy that happened to be the same strategy that had been used by the PRO to support its most recent projects: "Whenever practical or feasible, the CEEB should join with, or seek the participation of, the Department of Education and other outside authorities in the financing and implementation of Board activities and services in Puerto Rico." (Committee Report, 1969, Page 7)

The significance of the Planning and Evaluation Committee was twofold: It confirmed that the PRO was moving in the right direction in terms of service to education in Puerto Rico, and it gave its blessing to an agenda for the immediate future which built on the accomplishments of the first six years. Whatever misgivings New York had about continued investment in Puerto Rico were not given much consideration in the report once stated in the prefatory note. One must assume that the financial issues were discussed, and that George Hanford insisted on the need to improve the financial situation, but the local members must have argued strongly for continued support from New York while at the same time expressing that the educational community would find ways of supporting the Office. The issue was put temporarily on hold, but it would reappear in force a few years later when the subsidy to PRO increased, in part as a consequence of going ahead with many of the committee's recommendations.

B. Two major studies are conducted by the CEEB and the PRO about important aspects of higher education in Puerto Rico.

The PRO began implementing some of the recommendations of the Planning and Evaluation Committee even before the report was completed. But before explaining the specific activities engaged in by the PRO to strengthen the existing programs and begin development of new ones, it is necessary to examine two special studies conducted between 1969 to 1971 that were to become, each in its own way, major contributions of the College Board to Puerto Rican education. Although not a direct consequence of the Planning and Evaluation Committee, these studies addressed situations about which the committee had made recommendations, and supported them with strong evidence.

1. A comprehensive study of the role of the College Board in Puerto Rico (1971).¹⁶

This study, conducted during 1970 by Dr. Dean Whitla, director, Office of Tests at Harvard, and Janet P. Hanley, his wife, who was a research associate at Harvard, was indeed a milestone that in many ways set the course the Puerto Rico Office would follow for at least two decades. Although the study was contracted as an independent critical review of the admissions testing program developed by the College Board on the island and now used by local institutions, the authors went far beyond the original charge, broadening its scope until it became a comprehensive review of transition from high school to college in Puerto Rico. It was the first comprehensive study of admissions since the introduction of the College Board tests in Puerto Rico. It happened at the right moment, for soon after, access would expand substantially as B.E.O.G., later Pell Grants, were extended to Puerto Rican students in 1973-74. The study examined and made specific recommendations on admissions policies and practices, including the admissions formula used by the state university system to which the vast majority of high school seniors applied for admission and that at the time served over two-thirds of higher education students. Whitla also dealt with strictly technical issues such as validity, reliability, and speededness, and test bias, and made recommendations to make the PAA a better instrument. The authors analyzed available statistics and many documents, gathered new data, and conducted surveys of major constituencies. They questioned several myths related to access, equity, the disadvantaged, and availability of financial aid in the Commonwealth. They made a strong case for the urgent need to improve counseling and to collect and use more information on students. They even made suggestions for improving teaching in public schools using scholarship-recipient college seniors as teaching assistants in high schools..

The study was submitted in February 1971 and published soon after by the Puerto Rico Office, which distributed it immediately to the educational community. Its findings and recommendations were so important for the discussion of transition to college in Puerto Rico and for the continuing future role of the PRO programs that it is relevant to examine them further. In doing so, we will make comments that are pertinent to interpret their historical import.

As the report title implies, the existing relationship between the College Board's Puerto Rico Office and the educational community in the Commonwealth was very unique. The PRO responded with commitment to the needs of the community, and the community reciprocated with willing collaboration, respect, and very high esteem. This relationship, Whitla told me several years later when we met, was much closer than the relationship between the CEEB and the educational community in the U.S. mainland and had less conflict and tension.

The first task undertaken was to analyze the use of the PAA and achievement tests in the Puerto Rican higher education institutions. The state university system had traditionally set stricter standards for the admissions process and practices, whereas the private institutions handled the tests scores with more flexibility. The UPR system used an admissions formula that weighted the admissions test scores and the high school average equally. Whitla found that, unlike in the United States, in Puerto Rico test scores were better predictors than high school grades. This was true for all institutions except one. This finding was interpreted as good evidence of the effectiveness of the tests in assessing abilities for college success. Some academics at the UPR system were in favor of giving more weight to the test because of the varying grading standards in different schools. Only a few were against any test use. The UPR system granted automatic admission to any student scoring in the 75th percentile in the combined tests' scores regardless of grades. Whitla recommended keeping the 50/50 formula, but introducing a major change and eliminating the 75th percentile rule. He had found that the state institution, which had very low tuition fees and offered the widest

16. Dean K. Whitla, and Janet P. Hanley, *Responsiveness and Reciprocity: the Role of the College Board in Puerto Rico* (CEEB, Puerto Rico, 1971), 36 pages.

variety of programs, was serving proportionately more students from families that were better-off economically. This finding confirmed what local researchers had found, and it remained an issue leading to experimental changes in the admissions practices several years later. Whitla also found that, as a group, disadvantaged students did less well on all the tests, but particularly so in English. So he argued in favor of leaving the 50/50 formula but integrating the Spanish and Math achievement scores to it. He predicted this would allow the disadvantaged to blunt the effect of their lower English score and increase their opportunity for admission to UPR. As to the 75th percentile rule, the authors thought that it was an anomaly that exaggerated the importance of the tests and favored elite students.

The authors were well aware of the emerging discussion of the effect of standardized tests on disadvantaged students. They had researched the issue on the U.S. mainland and were familiar with the literature. They took notice of research conducted by Puerto Rican sociologist Luis Nieves Falcón and published in 1965 as *Recruitment to Higher Education in Puerto Rico: 1940–1960*, (Editorial Universitaria, Río Piedras, 1965), acknowledging that “One of the best explorations of this subject anywhere was made by Nieves Falcón, who studied the relationship between the admissions index and social class” (p. 25). Using the scores of the admissions test used by UPR before the College Board’s test was developed, the researcher found that disadvantaged students tend to have lower test scores than students from private and elite schools. Whitla had found a similar tendency with the SAT scores in the States and now with the PAA scores in Puerto Rico. Whitla agreed that in this very direct sense, the disadvantaged are handicapped in their admission to college, but he pointed out that Nieves Falcón also found that grades tended to offset the impact of scores, because the grade averages of the disadvantaged students tended to be higher than those of students from private and elite high schools, a finding confirmed by Whitla in 1971. Thus, Whitla concluded that since grades and scores are weighted equally in the admissions index, the disadvantaged are not as handicapped in admissions as the scores’ data alone would lead us to assume.

In any event, Whitla requested an item analysis and conducted further statistical studies to find out if the tests were indeed biased. Using a sophisticated experimental design with students from disadvantaged and advantaged schools, he found no evidence to that effect. And independent examination by experts of the test items and test content found no biased language or situation. The disadvantaged students’ handicap resulted from the weaker preparation they received at their schools that could not be eradicated by eliminating the test. Programs to bring the disadvantaged students up to the level needed for success in college had been initiated at several institutions with federal and institutional funds. The authors called on the College Board to fully support the institutional evaluation of these programs and to conduct research on the academic performance of the admitted disadvantaged students.

The issue, of course, was not going to go away. Academics with serious questions and legitimate concerns continued to research the issue of test bias from different perspectives. And then there were the ideologues quoting and misquoting the serious researchers. But in Puerto Rico, admissions testing was not aggressively questioned to the extent that it was in the United States, and it never became a public issue. In the following years, at least two ideological articles appeared in local newspapers questioning the use of the College Board tests, and the articles made little impact. At least one of these was probably more related to the expansion of the Advanced Level program even though it directly attacked the admissions tests. Fortier responded to both, using arguments based on the findings discussed above.

We need not examine Whitla’s analyses of the PAA and Achievement tests’ technical characteristics. It suffices to say that reliability and validity were found to be very good, on a par with the SAT. But, on the other hand, the tests were too difficult for the tested population, particularly the Math tests. Too many high-difficulty items meant that too much test time was spent discriminating among the most able. Better discrimination was needed in the middle and lower ranges. Whitla recommended that test difficulty should be reduced, a recommendation that was soon implemented. Almost all students interviewed said that the tests were too long, whereas ETS analyses concluded that the tests were not speeded. Whitla felt that the discrepancy could be due to the pretest items included in the test package. These do not count for the score, but students were not aware of it. Whitla recommended that the number and difficulty of items in the experimental section be reduced.

A related finding was that students and counselors felt that taking five tests in one day was too much, even if in two sessions. The perception that fatigue affected performance was generalized, but it seemed to be stronger among public school students and their counselors. No hard evidence supporting this perception was found, but the authors recommended that the PRO restructure testing to two days. The admissions decision was so critical in Puerto Rico that it was recommended that the College Board make the testing conditions optimal and consider the human needs of the testing population. This was more important if, as recommended, the Spanish and Math

achievement scores were integrated into the admissions formula at the state university system. This recommendation was later implemented for a few years, and two half-day sessions were held on separate days, but it was found to be burdensome for the parties concerned, including students, and was later discontinued.

The issue of financial aid and access was also examined by Whitla and Hanley, and their conclusions were similar to those of James Nelson from CEEBNYO in his study of financial aid at the University of Puerto Rico conducted at about the same time, and to the much more comprehensive Kilpatrick Study, which will be reviewed in the following section.

As they looked into the broader aspects of the transition to college situation on the island, the authors found two widely held perceptions concerning access. One was that all capable students were attending college in Puerto Rico, and the other was that the most talented students attended only the University of Puerto Rico and that only the less capable attended the private institutions. But the authors' analysis of data led them to question these perceptions and to call them myths. Based on the 1964-65 population examined in PAA/ESLAT, they estimated that close to one-fourth of talented students were not attending college. They arrived at this from different analyses. For example, taking the 75th percentile rule as an indicator of talent, there were 456 students who scored above this line and were not attending college, compared to 1,739 who were attending. This is almost one out of every four. Using two other indicators of talent, mathematical reasoning and English achievement, they arrived at a similar conclusion. "Approximately one out of four most talented in mathematical reasoning and approximately one out of five of the most talented in English are not attending college" (p. 22). Because we have had no access to the appendixes of the Whitla Study, we cannot confirm if his statistics included the students who took the PAA/ACH tests for Puerto Rico **and also** took the SAT because they planned to apply to stateside institutions. If this group was not included, then the finding is quite surprising. If, on the contrary, the authors were not aware of this group, then the finding is questionable.

The perception that the talented students attended only the University of Puerto Rico's two oldest and major campuses, and that the less capable went to the private institutions was found to be only partially true. The data analyzed supported the assertion that as a group the students attending UPR were more able, but much overlap was also found, and a sizeable percentage of the students attending private institutions scored above the tests' mean. Whitla concluded that the difference among these groups had been magnified in the minds of the education community to the point where it was assumed that all high-ability students attended UPR and all low-ability students attended private colleges and that any exceptions to this rule were so infrequent as to be trivial, which was not the case. As is typical of myths, they did not disappear quickly, but the private institutions gained in their self-esteem, and would in time develop and claim their own niches for better students.

Another important issue brought up and analyzed by the study was the lack of financial aid for students attending private institutions. The small government scholarship grant program was inadequate for these institutions that were in fact receiving the poorer students. The authors foresaw the possible disappearance of the private institutions as tuition was by far their major source of income. If this were to happen, it would be harmful to Puerto Rico. And they strongly recommended sizable government scholarship grants on a continuous basis so these institutions could regain a sense of educational purpose and plan to strengthen their offerings and services to students. A strong private sector to offset a monolithic public university system would benefit Puerto Rico. The authors called on the College Board to support and collaborate in establishing a consistent and uniform financial aid system based on need. Later, the Kilpatrick Study was going to make a stronger case for increased financial aid. These recommendations did enhance the PRO's credibility and respect in the private institutions.

Another important issue addressed in this milestone study was the urgent need to strengthen guidance. The study found that transition to college in Puerto Rico was not adequately supported by a guidance and counseling program based on good information on student characteristics such as abilities, as well as vocational and academic interests. There was little support in the high schools, and even less in Grades 7 to 9, for responsible decision making, which would encourage students to match their abilities and interests with a wide range of professional possibilities. The authors were surprised by what they described as the "anachronistic adherence to the formal academic avenues of social mobility and to the traditional professions which are the outcomes of a university education" (p.11). Two-thirds of students, independent of their talents and real possibilities, wanted to be medical doctors or other high-level health science professionals. Faced with this unbalanced preference for the health professions, the authors called for intensive guidance and more vocational and technical studies to prepare students for job opportunities in an emerging industrial-scientific society.

The study's recommendations were, of course, correct in that strengthening guidance was an urgent need and that technical and vocational studies should be promoted. On the other hand, one cannot but smile diplomatically at the authors' strong language and calling this a "syndrome" with the pathological connotations of the word. The alluded situation had a historical-sociological explanation. Puerto Rico entered the twentieth century with no higher education until 1903, and no medical school until the 1950s. Meanwhile, the majority of the population was very poor and suffered the traditional plagues of poverty. The relatively few physicians fighting sickness were trained in Spain, the U.S., and even France. The medical doctor and the pharmacist became the best examples of the science-based professional. They were well respected in society and in addition, they had relatively good incomes. So it is no wonder that when studying medicine in the island became a possibility, many college-going students, and their parents, chose it as their professional goal, even if the majority were not going to make it. This inclination for medicine and other traditional professions was also characteristic of all of Latin America as Fortier reported in his study. Today, although the managerial and technological professions are attracting many students, medicine and law remain excessively strong.

Whitla and Hanley found that even as the College Board was well respected and little questioned as a source of objective information on which to base admissions decisions, nevertheless, students, counselors and others expressed their conviction that the criteria and the information collected had to be broadened. Indeed there was a predominant request of a more profound assessment beyond abilities and academic achievement, which would take into consideration personal characteristics of students such as interests, goals, motivations, and commitment, which would produce a more complete profile and a better match with career choices. This strong feeling was very often accompanied, with no apparent awareness of a possible contradiction, by an equally strong feeling that admissions had to be completely objective. Almost in a tragic response, Whitla says these very wise words:

"Unfortunately, what objectivity can cloak is that the Board scores are related to educational opportunity, and until educational opportunity is equalized, an inherently preferential system is in fact operating." (p. 8)

As the Planning and Evaluation Committee had previously recommended, the Whitla Study comes out very strong in favor of the College Board's developing new instruments to support the guidance function in Puerto Rico. But Whitla was convinced that one of these instruments should be a Spanish version of the PSAT/NMSQT, an idea favored by some PRO staff, but which the committee had vetoed. He argued that administering the PSAT/NMSQT in the junior year would be an important element in a strong guidance service for all students for several reasons. The test could be used as a diagnostic instrument, and it would provide experience with timed multiple-choice tests focused on reasoning and problem-solving for public school students who had complained that they were less exposed to this type of test than their private school counterparts. Offering the test could strengthen the concept of rigorous application to studies for attending to college, and it would provide anticipatory information to students and teachers as a reality quotient for planning. The test would prod teachers and schools to focus on skill development rather than on rote learning. And it would be inexpensive since it could be assembled with previously used PAA items.

In addition to the PSAT/NMSQT, Whitla and Hanley recommended the development of instruments to help students evaluate their own talents and interests and to relate these with a wide range of satisfying vocations. An interest inventory instrument should help students and their counselors to search for reasonable vocational alternatives. As we shall see, a Spanish version of the PSAT/NMSQT was not created, but a Guidance Information Service was launched in 1976 that included locally developed reasoning tests and biographical and interest information to support counseling in the junior high school. The same year, a Student Descriptive Questionnaire (*Cuestionario de Datos Biográficos*) was integrated with the application form for the admissions tests and soon became a chief source of information for counseling and admissions.

The report touches on other problems in Puerto Rican education not directly related to admissions, and with their characteristic social idealism, the authors proposed solutions, and above all, reaffirmed their hope in young people and their conviction that giving college students a role in solving society's problems was a much better strategy than shutting them out. Thus, to solve the problem of poor teaching in high schools, they proposed training bright poor college seniors as teacher aids and tutors. This would allow these college seniors to earn some additional money while performing an important social service, and it would infuse high school teaching with up-to-date content, methods, and the energy of young scholars. Perhaps some of the students would decide to enter teaching. Whitla and Hanley also reported the increasing student militancy at the state university campuses, particularly in Río Piedras, where as in several campuses on the mainland, violent incidents had occurred. This was the local manifestation of the late sixties, worldwide student movement that united a generation of students against what they perceived as grave

social injustices, including limited access to higher education, the spending of vast amounts of money for war, and a generalized questioning of traditional culture. In Puerto Rico, these causes became intermingled with the issue of the colonial nature of the relationship with the United States, which the creation of the Commonwealth had not really solved, and became a principal issue within the student movement. The authors expressed their hope that it was not too late for dialogue and advised authorities to exercise prudence.

As we have seen, several of the recommendations of the Whitla study coincided with the priorities established by the Planning and Evaluation Committee. The significance of Whitla and Hanley, however, is that most if not all of their recommendations were substantiated by statistical analyses and extensive interviews, and that their much longer report conveyed a sense of conviction and commitment that earned the respect of the educational community in Puerto Rico and became a source of inspiration to the staff of the PRO. These words are representative of the human quality of the authors:

In general, we believe that the Board must at this point in history be aggressive in pressing forward with research and program elements that will help to minimize the existing qualitative discrepancies within the public education system, at the same time that it supports more diverse forms of continuing education (both technical and vocational). In addition, the Board must find ways to demonstrate its deep concern for individual development of young people, particularly through more diagnostically oriented guidance services.” (p. 5)

Dean Whitla's relation with the PRO and Puerto Rico did not end with this milestone report. He was called again later to conduct another study of the admissions tests and he served as Trustee representative to the PRO Advisory Council for several years. He was indeed a major contributor to expanding the College Board's role and its dynamics of responsiveness and reciprocity within the Puerto Rican educational community.

2. A milestone study of student financial aid needs and practices in higher education in Puerto Rico.¹⁷

The other major study of this period was equally important for higher education in Puerto Rico, although by its very nature, it had less impact on the future development of the PRO as such. The major beneficiaries were to be the majority of students going to college in Puerto Rico and the private institutions who served so many of them. It established basic principles of financial aid based on need, proposed methodologies for financial need analyses, and uncovered many injustices and inefficiencies in the existing scholarship programs on the island.

The CBPRO had been contributing to the discussion on financial aid since the late sixties, particularly related to the discussion of Public Law 64 of June 24, 1969. Fortier had arranged for James Nelson, from the Board's College Scholarship Service, to study the financial aid practices at the University of Puerto Rico. This study was published in May 1969. Fortier testified before a Puerto Rico Senate commission on the need to increase scholarship funds for private institutions. Then the Senate Commission on Education requested from him to expand on his suggestion that a comprehensive study of the actual administration of public funds for scholarships was needed. In his memorandum to the Senate Commission, he offered the technical services of the College Board in support of the study. The Council of Higher Education (CHE) assumed the responsibility for the study and through negotiations with Fortier, contracted the CEEB to conduct it in April 1970. John Kilpatrick was at the time vice president of the CEEB and he assumed responsibility for the project when James Nelson had to take another major assignment. Kilpatrick recruited and directed a group of consultants from the mainland and Puerto Rico¹⁸ for what was to be the first comprehensive

17. John Kilpatrick, *Study of Student Financial Aid in Higher Education in Puerto Rico*, College Entrance Examination Board, New York, March 1971, 189 pages.

18. Adolfo Fortier, James Nelson, Darrell Morris, and Edward Jacobson, from the CEEB; James Bowman of ETS; and, Joseph D. Boyd, executive director of Illinois State Commission on Scholarships; were the principal consultants. Pio Maldonado, director of the Financial Aid and Scholarships Program of the UPR Medical Science Campus was the coordinator. Mr. Roque Guzmán, from the CHE staff and who had coordinated the aforementioned previous task force on the subject, provided his knowledge and the statistics from CHE. Several PRO staff members provided support for the project operation and provided information and statistics from the emerging data base produced by the admissions testing program. An external advisory committee bringing different perspectives of the financial aid picture was appointed. It included banking and financial experts, the Chair of the recently established State Board of Education, a private university student council president, and two mainland educators familiar with financial aid at the state and the federal level, respectively.

technical study of student financial aid in Puerto Rico. The Kilpatrick Study, submitted to the council in March 1971, followed on the footsteps of a previous important but less comprehensive effort made by a CHE task force in 1969.

The broad purpose of the study was to look into the existing financial aid operations in Puerto Rico and to make recommendations to improve them. There were five specific goals: (1) to determine the cost of studying at college in Puerto Rico; (2) to identify all financial aid available for students; (3) to find out how it was distributed, to whom, and according to what criteria; (4) to make recommendations for making the financial aid operations more efficient; and (5) to estimate the financial aid needed to increase college opportunities for more poor students. All available historical data was analyzed, surveys of several groups within the schools and the higher education institutions were conducted, and data which had never been collected before was gathered and analyzed. The historical and the new data was submitted to different types of analysis applying general statistical methodologies as well as special ones for dealing with financial aid.

Overall, the study group found that the “lack of an equitable and reliable financial need analysis [was] the largest single limitation in student financial aid administration in Puerto Rican universities” (p.viii). This conclusion was supported by all findings resulting from numerous surveys and analyses of financial aid operations.

Looking into how much was spent in all of higher education in Puerto Rico and the sources of the monies spent, the study found that in 1969-70 this amounted to at least \$144 million dollars. These funds came from different sources: 46 percent came from the Commonwealth government, 25 percent came from federal funds, 28 percent from parents and students, and a meager 3 percent from institutional and other sources such as foundations and business. When breaking down the sources for paying the public and private costs, there was a substantial difference in the source of funding between the public state university and the private institutions. The University of Puerto Rico received 78 percent of its operational funds directly as appropriations and scholarship grants from the Commonwealth government, and the parents and students provided 20 percent through tuition payments. In the private universities, the parents and students were the source of 55 percent of the funds; Commonwealth and federal student grants provided 41 percent, and the institutions 4 percent.

The difference was the consequence of substantially lower tuition costs in the public system. But even these figures distorted reality somewhat because in the federal contribution the federal loans were included. These would have to be paid eventually by the students and/or parents, so that their contribution to paying for higher education increases to 28 percent in the public institutions and a whopping 67 percent in the private ones.

A questionnaire administered to all undergraduates in May 1970 provided an interesting profile of students attending college. Of the many characteristics we present only the most relevant for the recommendations made in the study: 27 percent reported working an average of seven hours per week during the academic year, whereas 10 percent reported working 40 hours weekly; more than 70 percent lived with parents or relatives; students attending the public university tend to come from more affluent families than do those in private institutions; more women students came from lower-income families on the average than men; as reported, 54 percent of all undergraduates came from families with parental annual income of less than \$4,000; at UPR this was 50 percent while at the private colleges it was 60 percent; more than 85 percent came from families with annual incomes below \$6,000.

These statistics show that going to college was not easy and that Puerto Rican families were making great sacrifices to support their college-going sons and daughters. As a whole, the population of the island was still poor. But the students attending higher education were better off than those not attending. Their combined average family income was \$6,220 whereas the general average family income in Puerto Rico was \$4,815. This meant that the poor were underrepresented, and the better-off were, proportionately speaking, overrepresented in college. Again the discrepancy between public and private sector is important. In private universities' students family income was only 10 percent higher than for all island families.

Kilpatrick investigated the direct costs (tuition, fees, books and supplies) for studying a regular program at the state university system and at the private institutions. The average cost at the private universities was \$695, more than three times of that of the public system: \$220. Adding other costs such as room and board, transportation, laundry, and personal expenses, the average cost for studying in Puerto Rico was \$1,090 in the public university and \$1,595 in the private ones. Even though this cost was considerably lower than the average cost for the United States as a whole, its impact on families and students was much harder considering the preceding data on family income. If, as expected, costs continue to increase faster than state revenues or family income, many of the students not currently needing aid would require assistance in the future.. The conclusion seemed to be inescapable. Who goes to college will

increasingly be determined by the availability of financial aid. And as Whitla had warned, the healthy development of private institutions would also depend on it.

The Puerto Rican students' source for paying college-going costs were principally their parents, who contributed more than 33 percent, while educational loans, part-time employment and savings amounted to 30 percent, the rest came from federal and local grants. But, again, there was inequality between those going to the UPR and those going to private institutions. The latter had less grant money available to them and had to lean more on loans, and their tuition expense was much higher. In fact, they had to borrow an average of \$625, or three times as much as a needy UPR student. Kilpatrick saw the dramatic plight of the private institution student and their families. The inequality was rampant, and the solution seemed to him simple enough: "more grant money should be made available to the private universities."

The overall funds administered by universities for financial aid in 1969-70 amounted to 14.1 million dollars. Of this amount, 58 percent came from the federal government, 38 percent from the Commonwealth, and 4 percent from private and institutional sources. Many students also received aid from other programs not controlled by the universities, such as veteran benefits, social security and employers' study grants. These other sources not controlled by the universities amounted to 13 million dollars, bringing up the overall financial aid available in Puerto Rico to about \$25 million.

At the time of the study, the federal guaranteed bank loan program was providing more financial aid than the Commonwealth legislative grants. Kilpatrick studied loan use in 11 states with characteristics somewhat similar to Puerto Rico and found that the number of borrowers and the amount borrowed was not out of line with those states and the national average. However, as he keenly observed, the critical question was if students from families with such low incomes should be borrowing as much as mainland families with better financial status. Thus, the study recommended that universities control the use of federal loans, particularly that they try to prevent overborrowing by the poorer students because it would lead to too much indebtedness over several years of study. Also, universities should impose stricter control of students who do not really need financial aid from borrowing by taking advantage of the fact that federal eligibility for the loans as compared to the Puerto Rican average family incomes allowed it. But the substantial contribution of loans for student financial aid was not going to disappear, so the study suggested restructuring the way they were being handled. The importance of the federal guaranteed loans on the island and the many questions that the local banks had about the risks involved in student loans led the study staff to recommend the creation of a Commonwealth Fund, receiving funds from the banks, insurance agencies, business, and government bonds, for their financing and administration.

Independent of the student loan situation, the most dramatic recommendation made by the Kilpatrick Study was for the government to substantially increase the funds available for direct grants to students. This amount was estimated to be \$19 million, more than double the amount provided by the Commonwealth in 1969-70. These funds, to be administered by the universities, would allow universities to provide aid to more needy students, increase the amount they receive, and reduce dependency on loans.

Another recommendation questioned the tradition of awarding financial aid based on academic merit independent of need. Whitla and Nelson had already questioned this policy, which was the prevailing policy in Puerto Rico and was deeply ingrained in the Latin American tradition. Backed by strong statistical analyses, Kilpatrick called for abandoning the use of academic criteria as a criterion for granting most direct aid and loans, and to grant these to admitted students on the basis of an objective and uniform analysis of the real need faced by students to pay for their studies. They strongly questioned the policy whereby about 1,500 UPR students with a 3.5 grade average regularly received an Honors Scholarship which gave them free tuition. Analysis of these recipients showed that about two-thirds of those did not receive other financial aid because, one must assume, they did not need it. The study recommends that UPR grant instead an Honors Certificate to recognize high academic achievement but without any remission of tuition.

The other far-ranging recommendation was a complete restructuring of the way financial aid was administered in Puerto Rico. This included establishing a uniform and reliable system to analyze need to be used by all institutions, instead of the existing institution-based decision, which is inefficient and more cumbersome for students. The model proposed was to begin with a uniform financial aid application form for all aid, including the legislative scholarships. These applications would be centrally processed, using previously agreed-upon criteria based solely on need. The grant money would go directly to the students through the universities.

The report also called for establishing a coordinating committee for financial aid to set the policies and ground rules for administering the available financial aid funds and the guaranteed loans. Then the universities, acting under ground rules established by themselves, the lending institutions, and the guarantee agency, should be made responsible for determining the total financial need of the students and recommending which students would receive loans and the amounts of loans to be granted. In short, the report argued for the centralization of four components of the financial aid administration process: a uniform aid application, a uniform need analysis system, central processing of all aid applications, and central awarding of legislative appropriations.

Although the study found that parents and students were relatively well informed about the costs of going to college and the available financial aid, it recommends that more information be transmitted to the high schools and the guidance counselors. They also called for special efforts to identify poor talented students and stimulate them to go to college and get financial aid. They also expressed the need for a study of why young men were not going to college in proportion to the number of young men in the general population. They wondered if the reason was that men were expected to go to work earlier to contribute to family income.

The Kilpatrick Study was well received in Puerto Rico, not only by higher education institutions but also by the public. Newspapers covered the study; the Council of Higher Education gave it serious consideration and prepared proposals for the legislature; researchers and historians of higher education referred to it as a milestone. The private institutions were glad to see their plight understood and verified by an objective external study. The legislature called for public hearings, and in August 1973, Fortier represented the College Board in support of the major recommendations.

In his deposition, Fortier agreed with the general direction and principles contained in two projects submitted to the legislature by the Council of Higher Education. Three major ideas the CHE adopted from the Kilpatrick Study were (1) that a just, equitable, and efficient system of financial aid should be established for students attending all the accredited universities in Puerto Rico; (2) that there should be one single methodology and one application for financial aid; and (3) that there should be a central body to determine the financial aid needs and to formulate the policies and norms to coordinate the system.

In his deposition, Fortier emphasized that a central system of financial aid must be developed within a master plan for the development of higher education in Puerto Rico. This was so, because the availability or unavailability of financial aid had great impact on the academic offerings institutions could make available. He pointed out that even with the limited aid available, Puerto Rico had a very high rate of participation in higher education. In 1972-73, 22 percent of young people of college age were attending college, a rate surpassed in the Americas only by Canada and the U.S. mainland. But, as the College Board report recommended, financial aid should be increased to \$19.2 million, to apply the same criteria used in the States. On the other hand, Fortier warned the Commission that a large part of the academic offerings were in the liberal arts and that this could increase with more financial aid. He recommended that a different academic offering should be encouraged at both the vocational high school level and at the technical postsecondary level so that human resource needs for the island's economic development would be satisfied. He also warned that increasing the number of students who can attend college would automatically increase the need for remedial programs to help these new students meet the stronger requirements of higher education. Thus, in a master plan, any increase in financial aid which stimulates attendance should also provide funds to the institutions to support adequate developmental programs for students. He completed his presentation by reminding the Commission that whatever they do to increase financial aid must also enable the most talented students to get the best education possible. He recommended that the University of Puerto Rico system increase tuition so that it does not continue to indirectly subsidize students from better-off families. Finally, in a view which deviated from Kilpatrick's position, he suggested that all financial aid be offered as a loan to be repaid over a long period after graduation in proportion to the borrower's income. This money should be returned to a permanent educational fund to support new students.

The legislature did increase funds for scholarship grants for students in private institutions and assigned their administration to the Council. The amount was much less than the 19 million the Kilpatrick study recommended. But as history goes, the whole financial aid situation in Puerto Rico was soon to change dramatically when the U.S. Congress approved the Basic Educational Opportunities Grants (BEOG) program and extended it to the Commonwealth in 1973.

The Basic Educational Opportunities Grant, later known as Pell Grants, made all poor students studying full-time or half-time in any accredited college eligible for needs-based aid. Soon, most of the students who were receiving

financial aid in Puerto Rico qualified for the BEOG. This was the case because as we have seen, average family income in the Commonwealth was considerably lower than in the States, so most families were under the federal poverty level, and a larger proportion of students here qualified under the financial need criteria. This situation has prevailed up to this time. As the federal grant program developed, many of the ideas recommended by the Kilpatrick Study for Puerto Rico, such as a uniform application form and a uniform needs analysis system, came into being, in part influenced by the College Scholarship Service which had been developed by the College Board in the States, and which was the source of many of the ideas suggested by Kilpatrick.

The impact of this federal program was so substantial that it became the sole major mover of the expansion of higher education opportunities in Puerto Rico after 1975, and of the expansion of the private sector until it became the major provider of college education. Puerto Rico government funds continued to increase slowly but steadily and during the past several years the Council of Higher Education has distributed close to 23 million dollars in need-based grants to private institutions' students. The colleges administer and assign these funds using a common needs-analysis formula closely aligned with the federal form.

3. Implementing the recommendations of the Planning and Evaluation Committee and the Whitla Study: 1969 to 1975.

The Planning and Evaluation Committee had provided the PRO with an agenda for development and the Whitla Study gave strong empirical and philosophical support to the committee's recommendations. The PRO had found a broader mission beyond admissions testing and the staff accepted it wholeheartedly and with renewed energy, even, to use Fortier's words "in the face of unavoidable financial limitations." From 1969 to 1975, the PAA and the new achievement tests reached maturity as college access and financial aid slowly but steadily expanded. The new Advanced Level program began to be accepted by schools and colleges and, near the end of the period, an expansion was contemplated. A new focus on guidance and working with counselors necessitated a large investment in a guidance information service. Internal research began to be conducted in the Office, and training in testing and in the use of tests strengthened the technical culture of the educational community. The *Academia* newsletter began publishing brief research reports, and the printing and distribution of studies, information, and user guides also intensified. Communications with local College Board members was established. And there was even time to commemorate the Tenth Anniversary of the PRO with a major conference on access in honor of Frank Bowles as the major force behind the idea to establish a College Board office in Puerto Rico.

The ATP (PEAU) begins to mature as access slowly expands.

The original PAA/ESLAT package had now been expanded to five tests, and the complete package was required by all the Puerto Rican institutions. The five tests were Verbal Reasoning, Mathematical Reasoning, which comprised the *Prueba de Aptitud Académica* (PAA), and the three achievement (ACH) tests in English, Spanish, and Mathematics. The whole admissions testing package was to be known as *Pruebas de Evaluación y Admisión Universitaria* or PEAU.

The test volume of the PRO admissions testing program increased from 1968-69 to 1974-75 by 50 percent, reaching over 33,000 tested students by 1975. Volume growth was more or less steady except from 1971 to 1973 when growth slowed down. Unfortunately, the PRO did not do systematic market analyses so that the ups and downs went largely unexplained. One problem was the poor statistics produced by the public school system, a problem which unfortunately has not improved much throughout the years. After a sharp increase in 1973-74, Dieppa admitted they had no explanation because "statistics do not show a very sharp increase in high school population for the previous years, although many counselors queried said they could have warned us last year based on their junior enrollment." Following a first-ever decrease in 1974-75, ATP test volume took off again as more funds from legislative grants were available for attending private colleges, and as the federal grants program got under way in Puerto Rico.

As a matter of fact, during this period, the number of students registered in colleges and postsecondary institutions licensed by the Council of Higher Education, increased from 57,338 in 1969-70 to 105,426 in 1975-76; this represented an increase of almost 84 percent.

This was also a period of relative large increases in the fees paid by the students for the required five test package. In 1968-69, the PAA/ESLAT fee of \$9 was increased to \$10 as the Spanish and Mathematics Achievement tests were added to the original PAA/ESLAT package. In 1972, the package fee was increased to \$12, and again in 1974 to \$15. These increases, which totaled 66 percent in five years, were necessary to cover larger expenses with the new

achievement tests. Since PEAU was the larger volume program, increasing the fee was the surest way to offset the effect on the budget of the annual increase in salaries and other fixed expenses. But the fee increases did not seem to affect volume much.

One possible reason for the above was the fee-waiver program, which began as an experiment in the PEAU November 1970 administration. Its aim was to help students who in all probability would meet other requirements for receiving college financial aid but whose limited resources could prevent them from taking the admissions tests. The schools themselves were responsible for selecting the students because the counselors and directors were in a better position to know their needs. A certificate for \$10, the full test fee, was sent to the student, who would in turn send the certificate with the registration form to the CBPRO. In later years when the fee increased, the fee waiver award also increased. During these first years, the program was limited to students from regular day high school programs in public and private high schools.

The first year, a total of 1,723 applications for waivers were received from students in 124 public and 23 private high schools. Of these, 966 were granted (56 percent), and 869 were actually used. The profile of the students who received the fee waiver was indeed of able but very poor students. Most of the students came from families with less than \$2,000 annual income and as a group had a 2.8 high school grade point average. For 1971-72, 969 waivers were granted, and these students could take the exam on any of the test administration dates during the academic year. The number of available fee-waivers was limited to approximately 1,000, but this ceiling was slowly raised as the fee increased and as the program extended beyond students attending regular day high schools to students from special projects for the disadvantaged like ASPIRA, Model Cities, and Upward-Bound. By 1976-77, the number of granted waivers had reached 1,330 candidates. In 1976, the recently established Advisory Council to the Puerto Rico Office approved a resolution extending the fee waiver to all programs and establishing 4 percent as the maximum number of candidates that could be awarded. The whole fee was to be waived for PEAU and the new Guidance Information Service, while Advanced Level students would receive a 50 percent waiver. By the end of 1975-76, more than \$100,000 in fee waivers had been granted and used by low-income students on the island.

The academic year 1968-69 was the second year that the achievement tests in Math and Spanish were administered. These new tests increased substantially the work required for the ATP as well as the expenses. With five tests the staff had to score, and for which they had to perform statistical analyses and send score reports, the amount of work had doubled. The Office staff began immediately to review the tests with support from consultants such as John Hills from CEAT and William Angoff from ETS. On another front, the staff worked with colleges to strengthen the use of the achievement scores for placement supporting research to validate placement cut-off scores, particularly in English and Math.

Much activity around the PEAU went on during these years. The reports of the three commissions that studied the teaching of Spanish, English and mathematics in Puerto Rico secondary schools were completed and widely distributed in 1969-70 throughout the educational community and was well received by it. In May 1971, it was announced that following Whitla's suggestion, the PAA and the Achievement tests would no longer be administered on the same day. The PAA and ESLAT were administered one day and the Mathematics and Spanish tests on another day the following week. As part of this rescheduling, the April administration was eliminated, and three regular administrations set for November, February, and June each academic year. Also in 1971, the staff worked with ETS consultants to address the issue of too many very difficult items on the tests, which Whitla had brought up in his study. As a security measure to prevent false impersonations, students' pictures were sent directly to the testing rooms. This was needed because not all high schools were test centers so that students from other schools would be unknown to the test center staff. We can see that PEAU was well on its way to establishing itself as a unique admissions testing program within the College Board organization.

After a slow start, Advanced Level shows some growth and receives external support for a major expansion.

Both the Planning and Evaluation Committee and the Whitla Study had recommended continuation of the Advanced Level Program, which had been developed under a contract with the Department of Education. In spite of its limited volume possibilities, Advanced Level was designated a high-priority item because it was expected to improve the quality of learning in high schools and to encourage curricular integration with college. During the first two years, the tests were free to public and private school students as specified in the contract with the Department. But in 1969-70 this was no longer the case, at least until a new arrangement with the Department was reached. The PRO set a \$20 fee for one test and \$25 for two. Although the Department did pay the public school students fee, with a discount for wholesale, the private school students had to pay individually.

Thus, while in May 1969, 807 students from 25 public and 17 private schools took 1,020 tests, in May 1970 there was a substantial drop in volume. The number of students participating dropped to 426, and they took only 547 tests, with 17 public and 14 private high schools participating. Two situations contributed to this setback. The fee was one factor, but also many public schools thought the program had ended with the installment of a new Secretary and new government. Puerto Rican political tradition had been that new administrations did away with what previous administrations had done. It is a credit to the PRO that it fought that tradition, and for the most part was able to establish continuity in the programs it provided to the public school system. So in the year 1970-71, the Department did support the program, and an agreement was signed for the Department to pay the test fees, though at a fixed total price. This arrangement endured for many years. Even though the fixed total price was raised several times, it was not cost efficient for the program. Although it stimulated school and student participation, there was no corresponding income increase. That year the number of participating public schools rose to 40, and 1,200 students were registered in the courses. In 1973-74, another change in administration introduced a new Secretary of Education who gave full support to the Advanced Level program as she saw it as a way to efficiently meet the needs of the talented students. Professor Celeste Benítez, niece of the legendary Jaime Benítez, appointed a full-time coordinator for the program at the Department Central Office who worked closely with Santos Meléndez, Assistant Director in charge of the program at the PRO to recover the schools which had dropped out and to set high goals for the year. These goals were established: a 75 percent increase in the number of public schools participating, and 100 percent for students examined. New strategies were agreed upon to achieve the goals. Written communications with the school principals and counselors were intensified, and several meetings to promote the program were held. Most important: That summer, six two-week workshops for teachers were conducted. These consisted of three workshops for Spanish teachers, one for English, and two for Mathematics, and they trained an unprecedented number of teachers. The strategies produced the desired results, and an increase of 140 percent over 1972-73 was achieved. A total of 2,416 tests were administered, five times as many in public schools and twice as many in private schools, when compared with the previous year.

Staff also worked hard to strengthen other aspects of the program, particularly with the accreditation at the colleges. An important achievement was to convince the UPR Mayaguez campus to grant credit to students obtaining a score of 3 in Spanish and English. The issue of accreditation was most important because it was the external motivation for students to take the courses and the examinations. But it was also a most delicate issue because many college professors resisted the idea. The Mayaguez campus was the second most important in the UPR system and received a large number of the talented students. At this time this campus and Inter American University also requested to conduct institutional administrations for small groups of students who had not taken the courses in high school but whose PEAU scores suggested they could challenge the exams. These requests meant that coexisting with resistance, there was also some interest in using Advanced Level as a CLEP-type credit-by-examination program.

Several strategies were used to gain acceptance for the program with college departments whose faculty were somewhat skeptical as to the possibility that their courses could be taught in high schools by teachers who were not college professors. Initially, when the program was being developed, the test committees met frequently with the chairpersons of the corresponding college departments to discuss the course syllabus and exams. After the first two years, they met annually to discuss changes to the syllabi and the exams, and examine the score statistics.

An important argument used to convince the reluctant college professors and the academic bodies who established the accreditation policy came from a follow-up study of the students who took the exams in 1967-68 and 1968-69. The results, published as a supplement to *Academia* in January 1971, showed that the program was effective as the students did very well in the second-year courses in which they were placed in college. College grades from 820 students (57 percent of the universe) were received from their institutions. The results were quite positive: 88 percent of the students who scored 4 or 5 and were placed in second-year courses obtained A or B in said courses; 87 percent of those placed in similar or lower-level courses obtained A or B. Of the students who scored 3, and were placed in higher-level courses, 72 percent obtained A or B; and of those placed in similar or lower-level courses, 91 percent obtained A or B. Even those students who scored 1 or 2 did quite well: of those placed in higher level courses, 71 percent obtained C or higher, with 37 percent obtaining A or B; of those placed in similar or lower level courses, 89 percent obtained C or higher, with 54.7 percent obtaining A or B.

In 1972-73, Fortier and the staff began planning an expansion of the Advanced Level program (See: *The College Board Office in Puerto Rico*, September 19, 1972, 4 pages). New examinations would be developed, and these would be available to adults and college students in a more comprehensive and flexible credit-by-examination program. The idea was to allow people to demonstrate their knowledge independently of whether it was acquired in a regular

course or through nontraditional ways, and to earn credit for this knowledge. Five additional examinations would be developed: social sciences, humanities, biological sciences, physical sciences, and a second level of mathematics. Together with the Advanced Level tests in Spanish, English, and Mathematics, these new tests would complete the required core curriculum for all undergraduate degrees in Puerto Rico and be open to college students and adults, as well as to high school seniors. The estimated development cost for the five tests was \$150,000 and the Association of College and University Presidents pledged a grant for half that amount if the other half could be secured by the College Board from other sources. Fortier began a campaign seeking support from business and industry and the NYO helped with foundations on the mainland. If successful, this would be the first time in Puerto Rico that the business and the higher education sectors would get together to support a major academic program.

In March 1974, external funding for the credit-by-examination program was completed, and work began soon afterward in the five new examinations. Small grants were received from several multinational and local corporations, three Puerto Rican banks, the local Angel Ramos Foundation, and the largest one from the mainland Carnegie Fund which granted \$35,000. It was a major accomplishment for Fortier to convince college presidents and business leaders to sponsor the Advanced Level expansion. Unfortunately, it was also the one big mistake or misjudgment in his extraordinary career. Convincing presidents and business leaders was one thing, but as we shall see later, convincing professors and academic bodies at the University of Puerto Rico's flagship Río Piedras campus proved to be much more difficult and eventually catastrophic for the new initiative.

A new focus on guidance and working with counselors.

As we know, the PRO had been working closely with high school counselors since its foundation. It was crucial that these professionals understood what the PAA was all about and that they were better informed to advise the students before and after the test was administered. Hence, meetings were held annually throughout the island, reaching most of the high school counselors. These meetings lasted three to four hours and concentrated on transmitting basic information on the test and the scores. But the Planning and Evaluation Committee, the Kilpatrick Study, and Whitla had documented the need for an urgent all-out effort to improve counseling in the secondary (Grades 7 to 9) and high schools (Grades 10 to 12) of Puerto Rico. Whitla had been emphatic about the role the College Board had to play in supporting the Department of Education in this endeavor and had called for new instruments in support of guidance and counseling.

However, in the early seventies, the PRO was too busy strengthening the PEAU and the Advanced Level programs, as well as dealing with a difficult fiscal situation, to be able to engage in another program. Instead, it intensified its work with counselors and collaborated with the Department and the universities' counselor training programs to update the practicing counselors' knowledge and skills. To facilitate this work, a new staff position was established in 1971 charged with developing guidance activities, reviewing and updating the existing publications for counselors, coordinating training workshops, and acting as liaison with the Department's Counseling Division. This new focus on guidance produced three important developments: intensive training to prepare a group of counselors in the use of data for planning and conducting counseling activities; a study of the Department of Education's counseling program; and the initial exploration of a new Guidance Information Service to be developed at a later time.

The public school system did not have efficient methods to collect, analyze, and communicate information about the students. What information was gathered took too much time to be analyzed and remained for the most part at the central system level. And this information was not collected with counseling in mind but for statistical reports of school registration, attendance, dropouts, and grades. This situation was changing as the College Board's admissions testing program began providing in 1970-71 group summaries for every school that tested more than 25 students. And in 1971, for the first time, a historical statistical summary covering from 1965 to 1970 was sent to the same schools. This information would allow the school to at least know where it stood compared to the total examined population and in what direction it was moving. But if the counselor could relate this information to other available information on the students and the school as a whole, and if he could collect additional information using simple research methods, guidance would be on a better footing, and the school administration could better identify teaching-learning problems and plan how to improve achievement levels and focus better on counseling activities. As a matter of fact, the CBPRO was already looking forward to collecting additional personal information through a questionnaire to be included in the PEAU test application form. It was necessary that counselors know what to do with the information now available or it would simply end in some file in the principal's office.

Thus the Department and the PRO agreed that in-service training was needed to teach counselors how to use the research findings in their work, and how to conduct simple research to gather information on relevant student and

school characteristics. They joined efforts to sponsor a training project for the summer of 1970, with the Department providing funds for consultants, stipends to cover the counselors' travel expenses, and the CBPRO coordinating the activity, selecting the consultants who would design and conduct the training, and making available the workshop materials. More specifically, the three-week workshop was planned with two specific goals: (1) to train counselors to interpret and use findings from external studies, statistical reports prepared by the Department's central office, reports from the College Board, and other external sources; and (2) to train them in the collection, analysis, and use of data about their students that is relevant for counseling. The participants would have time to meet in small groups to practice preparing reports on existing data. This was the first time that intensive training on these subjects was offered to counselors in Puerto Rico.

Since resources were limited, it was decided to train well a small number of counselors and counseling supervisors who could become leaders in their own regions and districts, and conduct shorter training sessions for others. Thirty counselors were selected by the Department, including three general counseling supervisors and a good cross section of counselors from general and vocational high schools throughout the island. The three existing counseling training programs at the University of Puerto Rico Río Piedras Campus, Catholic University in Ponce, and Inter American University, were asked to participate with three purposes: first, to provide the best faculty for the planned training workshops; second, to make them conscious of the need to strengthen their own curriculum so that the future counselors would come out better prepared to handle statistics, do practical research, and plan the counseling activities based on empirical data and not just on their impressionistic view of what was needed. The third purpose was "politically" important: to bring together and strengthen communications between practitioners in the school system and the college counseling professors. The College Board was always the forum for these contacts between the teachers and counselors in the trenches and the college faculties who often had less or had lost contact with the harsh realities of the schools.

The 1970 summer session was a complete success, and the PRO built on it with two other activities. One was the publication of the consultants' presentations under the title: "The use of research results in counseling." Because of limited funding, this was a modest publication in mimeographed form, but it was sent to all high school counselors including the participants in the summer intensive training. And in the summer of 1971, a shorter follow-up two-week session was held to which participants were asked to bring available student data from their respective schools to learn how to analyze, interpret, and present them.

In March 1971, Fortier reported to the NYO that the Department had requested a proposal for evaluating their Division of Counseling but that the PRO was "putting our emphasis toward the development of a battery of tests and other guidance instruments to be used in the tenth grade instead of working in just a general survey of guidance services." Fortier suggested that the \$8,000 available could be better used when appointing a commission of experts and practitioners to identify specific needs for guidance instruments to support the transition from secondary to high school. He was of course leading the Department's senior management to focus on the need for information in support of guidance, which Whitla had already established as urgent, rather than spending the money in a general evaluation of the Department's programs and organization.

The Secretary agreed with Fortier's idea and in February 1972 a commission was jointly appointed by the Secretary and the College Board, charged with studying the needs and problems of the Guidance Program and looking into the desirability of developing a battery of tests and instruments to support guidance. Following the CBPRO's established practice, the commission brought together higher education and public school people, and in this case, a government expert in human resources development, and two high school students. Dr. Edward W. Cristensen, director of the Graduate Program in Counseling at the University of Puerto Rico, Río Piedras Campus, was the chairman while Dr. Robert Stoltz, director of the College Board's Southern Office was a consultant, and Mr. Rafael Urrutia, assistant director for guidance at the PRO, was the Executive Secretary.¹⁹

The Commission worked for a year, meeting with numerous counselors, school and central system staff, and students, and it presented its report in February 1973. The major recommendation was to develop a battery of tests and guidance instruments to provide counselors with useful and valid information to support their work. But instead of the original location of the program in the tenth grade, it recommended that it should be administered in the secondary school level, in Grades 8 or 9. In these grades, students were at a critical stage in their development and needed as much support as possible. In March 1974, conversations were ongoing between the PRO and the

19. For all the names of the commission members, see: *Academia*, #17, May 1972

Department looking for ways to make the guidance battery a reality in a not too distant future. The proposal under consideration was to develop a battery of three tests in abstract, verbal, and quantitative reasoning, and a general biographical and interest inventory that would provide individual and group reports. The Department had immediately shown interest in this project.

Because guidance was a primary concern at the Department, they were willing to consider different alternatives. At this time, the College Board's national office had developed a guidance product called "Deciding" which aroused some interest in Puerto Rico. The possibility of translating this product into Spanish for use in Puerto Rico and with Hispanics on the mainland was given serious consideration by the educational authorities, but funding was not available. A joint proposal from the Department and the CB/PRO was submitted to foundations and the federal government, but it was not funded. The project was dropped as the Department and the PRO concentrated their resources in developing the battery of guidance instruments that eventually became the Guidance Information Service.

The issue of possible services from the PRO to Hispanics on the mainland was always "there," but it did not receive the full attention and resources needed to really do much about it during this period. Since its foundation, the charge to the PRO had included this possibility, and periodically it came up for consideration, or rather for conversation, but the CEEB had higher priorities, and the PRO was always struggling to survive in Puerto Rico. Perhaps Fortier was more interested in supporting admissions in Latin America than in getting involved with the many complexities of Hispanics in the States. There were of course some attempts to develop special programs but with little results. In 1971-72, the PRO conducted experimental administrations of the PAA with Puerto Rican students in New Jersey in collaboration with Dr. George Kramer of Rutgers University. Interest in exploring the possibility of using the PAA was also expressed by University of Puerto Rico professors Dr. Eduardo Seda and Dr. Luis Nieves-Falcon, at the time visiting professors at Hunter and Brooklyn colleges in New York City, and by the Multilingual Assessment Project of Brentwood, New York. But a myriad of administrative, political, and technical difficulties prevented these interests from becoming practical sustainable activities.

But a few mainland institutions on the East coast and the at University of Texas at El Paso did use the PAA with Spanish-speaking applicants. UTEP has remained the only important institution using the PAA in the United States. Also, a preliminary proposal for piloting ESLAT with Hispanics on the mainland was prepared by the PRO but apparently was not approved.

It was under George Hanford's presidency (1979-86), that the CEEB made important and sustained efforts to address the issue of the higher education opportunities for Hispanics on the mainland. He invited leaders of the major Hispanic organizations to find ways to increase the rate of Hispanics going on to college, which Hanford called "one of the most critical issues on the American education scene." He was convinced that the PRO experience gave the College Board an informed base from which to meet the educational needs of Hispanic youth as well as a certain credibility with leaders in Hispanic communities. One of several positive results of these conversations was the National Hispanic Scholar Award Program in 1983-84, which was the first publicly important program sponsored by the CEEB for Hispanics, with Mellon Foundation funds. This program was extended to Puerto Rico in 1986 using the PAA instead of the PSAT/NMSQT as one of the selection criteria.

In fairness to the Board, it should be said that it was no easy endeavor to bring together the Hispanic groups because there were important differences in their historical backgrounds and in the circumstances under which they or their parents migrated to the United States. They had no unified vision of themselves as **one** ethnic minority or a common approach to improving their situation. The all-encompassing reference to "Hispanics" or to "Latinos" was not equally accepted by the Mexican-Americans in California and the Southwest, the Cubans in Florida, and the Puerto Ricans in the Eastern states and Chicago. The Cubans fleeing from Fidel Castro had a more diverse socioeconomic and educational background, and they generally received special federal and local support as refugees from Communism, which complicated the situation. Even the groups' identification with the Spanish language did not work as a unifying element because there were substantial differences in the command of the language of recent arrivals to the United States who were Spanish dominant, and second and third generation members whose Spanish had been weakened and in some cases deteriorated as they struggled to survive the American education system.

Increasing research and technical consulting enhance the PRO's credibility.

From 1969 to 1975, research became established as a regular activity at the PRO. In addition to research to provide the needed technical support for the testing programs, there was substantial activity beyond the statistical research to validate tests and scores. During these years, the PRO staff actively participated in the Whitla and Kilpatrick studies, while at the same time engaging in important research on their own. Also, schools and institutions often requested support for their research needs and to satisfy their increasing interest in improving evaluation. The PRO staff was already recognized as a source of scientific knowledge and experience in educational research and evaluation, and they had to respond to these requests, even if this meant diverting some energy away from more immediate needs of the programs. By 1971-72, Dieppa was reporting an increase in consulting, technical workshops, and other support activities. Although this was a source of pride for the Office, it was mostly pro bono, and it soon became evident that additional staff would be needed to avoid the danger of overextending the staff capacity. Jorge Dieppa, Evangelina Alvarez-Silva, and Carlos López were responsible for most of these activities, which strengthened the bond between the College Board and the island educational community. A typical example of this work was a two-day workshop on evaluation conducted by Dieppa and López at the Graduate School of Social Work of the University of Puerto Rico, after which the Director wrote: "I write deeply thankful for the great impact of your workshop. We are all indebted for your contributions to creating better evaluators."

At the same time that it was offering consulting services and workshops, the PRO increased its efforts to communicate the results of its research activities to the educational community. This was achieved through modest publications, mostly mimeographed or at best by inexpensive offset printing, and also through regular use of the *Academia* newsletter to publish brief summaries of research completed by the staff, and later, longer research reports by staff and external researchers published as separable inserts in the newsletter. All these publications were, with few exceptions, distributed free to schools, to higher education institutions, and to interested education leaders and researchers. *Academia*, which was published three or four times during the year, had a wide distribution throughout the educational community, and this guaranteed that a large number and wide variety of readers had access to the research briefs and longer reports.

The reports of the three commissions that studied the teaching of Spanish, English, and math in Puerto Rican secondary schools were completed, published, and widely distributed (February 1969) as were the Planning and Evaluation Committee Report and the Whitla Study (1971). A five-year statistical summary for each high school and a comparative analysis of PAA/ACH scores for the six regions of the public school system were completed (1969-70). Six validity studies, one for each of the existing colleges using the PEAU, were conducted and discussed with the institutions as well as a five-year comparative analysis of students who applied for admission to each college (1969-71). Also, the first study of financial aid at the University of Puerto Rico system was conducted by James Nelson from the NYO with support from the PRO staff (May 1969). Also published at this time was the first report of all the PAA experimental administrations conducted in Latin America and validity studies for several institutions (1972).

As was to be expected, as soon as the PEAU tests became established, coaching activities were initiated at some high schools. This led to the first formal study to measure its effect on the test scores, conducted by Evangelina Alvarez-Silva, the PRO statistician, and published in *Academia*, first as a brief preliminary report (1969) and when completed as a *separata* [supplement] (1972). One must say that although the study concluded that special coaching had little effect on the scores, it continued and grew every year as schools, especially the private ones, wanted their students to do better and organized orientation courses on the test contents and how to best handle the different item types, and soon afterwards, some college extension programs began offering Saturday "review" courses at very low cost as part of their recruiting strategy.

The relation of the PAA scores to the SAT scores had been a question of interest initially related to the possible use of the PAA in lieu of the SAT for the admission of Latin American and Puerto Rican students to American colleges. The fact that the PAA was often identified as the Spanish SAT brought up the issue of the equivalence of the scores. A first attempt to establish some concordance between the two tests was made by ETS renowned researchers William Angoff and Christopher Modu, with support from the PRO staff. This study was very important as it experimented with pioneering methodology for equating the scores of two tests developed separately in different languages but with a similar structure. It included back-to-back translations of a number of items that were included on both tests and administered to a sample of students. A summary was first published as a supplement [*separata*] in *Academia* (1972) and later in full in the College Board /ETS Research series. (1973) Because of the several cautionary notes made by the authors, and of the large gap found between scores on the two scales, the concordance table was never

put to much use, and the PRO staff always remained doubtful about its practical usefulness. Two other studies were conducted in later years with somewhat similar results.

In 1969, the Río Piedras campus of the University of Puerto Rico requested support from the PRO to develop, administer, and score six assessment questionnaires for an institutional evaluation project sponsored by the Office of the Academic Dean. The purpose of this assessment was not to test the individual student's knowledge of specific subject content but to assess the levels of attainment of general academic skills and concepts, which were common institutional objectives in Spanish, English, Social Sciences, Humanities, Mathematics, and Science. The PRO was asked to advise and train six faculty committees who would develop the instruments that were to be administered to samples of students at the end of their freshman, sophomore, and senior years. The University of Texas at Austin's Office of Evaluation would also collaborate as consultants to the project. A contract was signed, whereby the PRO would advise the committees on technical matters and review their work to ensure the instruments were well constructed. It would also coordinate their administration and score them. The UT Office of Evaluation was to conduct additional statistical analyses and prepare a final report. This important project ran into unexpected delays as student unrest forced cancellation of the administration, and it was not possible to finish testing the selected samples until 1973. This was the first time that the PRO had contracted its services to develop non-College Board assessment instruments for use by an external organization in Puerto Rico, but it would not be the last. This project initiated a different kind of College Board contribution to education on the island, as well as a new source of income. Later, several other institutions as well as the Commonwealth Department of Education contracted with the PRO for developing tests for their own use. Eventually the modality of contract work begun during this period became a substantial source of the PRO's income and has remained so until today.

Serving members within an ambivalent associational structure.

As we know, the Puerto Rico Office had been established as a special office to develop assessments and programs in Spanish, and to provide services related to these assessments to schools and higher education institutions in Puerto Rico and Latin America. It was not part of the College Board's regional and governance structures. This regional structure was established to promote the use of College Board programs in assigned geographical regions and to provide support to member and nonmember schools and institutions using them. But the regions were also a structure for member participation in the Board's governance. When institutions and schools in Puerto Rico became members, they were assigned to the Middle States Region.

As in the States, members in Puerto Rico were of three kinds: secondary schools, higher education institutions, and educational systems. By the time of the PRO's tenth anniversary in 1973, there were 14 members on the island: the eight existing higher education institutions, the Commonwealth Department of Education, and six private schools. The Department of Education represented all the public schools since, as we know, it was a highly centralized system where the districts and the individual schools had very little autonomy.²⁰

Private schools played an important role in Puerto Rican education, but they were not a homogeneous group. A few of them were close to the American preparatory school model serving students from the better-off socioeconomic families. English was the sole language of instruction or the dominant one, and many of their students would apply for admission to American colleges on the mainland. The six secondary schools which were College Board members were in this group. There were also two other English-speaking schools at the military bases. All of these schools used the SAT, PSAT/NMSQT, and AP, and their counselors needed information about and service for these programs. Such information and service in the States were usually provided by the regional offices. But even if the schools did communicate often with the Middle States Regional Office (MSRO), the fact was that the PRO was closer than Philadelphia, and the schools felt that it should provide the support they wanted, and that as members or clients, they deserved. Because their interests were different from the public schools and from the majority of the private schools where Spanish was the dominant language of instruction, their counselors established an organization of their own, the Caribbean Counselors Association, bringing in members from the U.S. Virgin Islands and from American schools in the Caribbean basin. The PRO staff tried to accommodate their needs and coordinated with the MSRO,

20. The 14 CEEB members in Puerto Rico as of 1973 were: Higher education: Colegio Universitario del Sagrado Corazón, Puerto Rico Junior College, Universidad Católica de Puerto Rico, Universidad Central de Bayamón, Universidad de Puerto Rico; Administración de Colegios Regionales, Recinto de Río Piedras, Recinto de Mayagüez, Universidad Interamericana de Puerto Rico; Private high schools: Academia del Perpetuo Socorro, Colegio de La Salle, Colegio San Ignacio de Loyola, Commonwealth School, Robinson School, St. John's Preparatory School; and Educational System: The Commonwealth Department of Public Education.

the International Education Office, and the NYO to conduct workshops and meetings for them. At this time, a few stateside colleges began actively recruiting students in Puerto Rico, a practice that was to increase as federal policy began demanding more opportunities for minorities. But the local institutions were not too happy because they felt that the mainland colleges were skimming many of the better students to beef up their statistics of Spanish surnames without having to provide special services for them. These conflicts of interest between members forced the PRO to maintain a neutral course while serving different constituencies.

Since participation of the members from Puerto Rico at the national membership meetings was very limited due to the expenses involved in travel, the PRO began having occasional meetings with them to discuss their needs and provide information on all College Board programs, often bringing in speakers from the mainland for in-depth presentations. These meetings, however, were strictly informative and consultative, playing no role whatsoever in the governance structure.

There were several important activities related to the needs of these special constituencies and their students. In May 1969, the PRO hosted the CEEB regional directors' meeting, and the agenda included the programs in Spanish. The purpose was for the regional directors to become familiar with the PRO programs and be able to initially respond to questions from members in their region and forward these queries to the appropriate staff in Puerto Rico. The following year, in December 1970, the PRO joined NAFSA and ACCRAO in a two-week seminar at the University of Puerto Rico to discuss the issues of admissions for students whose main language was not English and how to handle their credentials and test scores. Admissions officers from 26 American and one Canadian institution attended. Local interested schools were able to attend some of the sessions.

On September 30, 1971, the local members as well as counselors from all schools that administered the SAT in Puerto Rico, met with Sam McCandless, executive director for planning at the CEEB, who explained the Student Descriptive Questionnaire.

Within this same context of associational activities, we must include the Tenth Anniversary celebration which took place May 17–18, 1973. As we have announced in the introduction and will explain in the following section, during these years, the PRO was facing a difficult fiscal situation and there were doubts about it continuing to be part of the College Board. Amidst this scenario, Fortier decided to celebrate the 10 years as if everything was normal and to use the occasion to honor Frank Bowles and bring him back to the island. Knowing Adolfo, I am convinced that nothing in this celebration was coincidental and everything was planned to convey to President Christ-Janer the important role played by the PRO in Puerto Rico and the high esteem in which the College Board was regarded in the Commonwealth. The celebration began on the evening of May 17 with a formal dinner to recognize Bowles at which all the island education leaders were present. President Christ-Janer, the Secretary of Public Education, the chair of the Council of Higher Education, and the president of the Association of University Presidents, presided at the affair, which was attended by all college presidents and chancellors, as well as the directors of the member high schools. Speakers paid homage to Bowles's 1962 initiative to establish an Office in Puerto Rico, to develop College Board programs in Spanish, and to his commitment to move the College Board to participate aggressively in support of expanded international student exchange, especially with Latin America. If his role in bringing the College Board to Puerto Rico was the center of the speeches, his important contributions to the University of Puerto Rico as a consultant to Jaime Benítez were not forgotten.

The celebration continued on May 18 with a major symposium on "Access to Postsecondary Education in Puerto Rico: Achievements and Aspirations — 1963–1973." Again, the time period discussed was no coincidence; it was meant to establish the role played by the PRO during its 10 years of existence in strengthening access and transition. The keynote speaker at the symposium was the Secretary of Education, Celeste Benítez, who discussed the Department's role in increasing access and presented the statistical projections for the future. She paid tribute to the College Board's Puerto Rico Office for supporting and being a true partner in the Department's mission. Three panel discussions followed: The first addressed the issue of equality of opportunities in Puerto Rico; the second discussed the role of nontraditional studies in expanding access; and the third focused on developing a counseling system to facilitate transition. It should be noted that several university presidents, chancellors, and deans participated in the three panel discussions. But as important as this was to show their commitment and support to the College Board, it was more important that over 600 people attended the symposium, representing all sectors of the educational community in Puerto Rico. This large attendance must have surprised the College Board president as it compared favorably to meetings held in the regions and at the national level.

Strange as it seems, while the activities we have described were going on and the presence and credibility of the College Board Puerto Rico Office were substantially enhanced, a sequence of events was taking place that threatened the continuation of the Office as an integral part of the organization. We must now turn to examine these events, their causes, and consequences, and the final resolution of what was a veritable institutional crisis for the Office in Puerto Rico.

C. The future of the PRO within the College Board organization is reexamined during 1971–1977.

As we have said, the issue of the financial health of the PRO did not come to an end with the Planning and Evaluation Committee of 1969. During 1971, the issue came up again for discussion. The fact was that there was no end in sight to the subsidy from New York, which by 1971-72 would have reached a total of \$1.25 million. As we know, the 1964 College Board Trustees' resolution changing the PRO's status from experimental to that of a regular program, and the 1969 Planning and Evaluation Committee Report, which was fully accepted by the Board of Trustees, had both reaffirmed the College Board's responsibility for the Puerto Rico Office as part of its overall mission to facilitate transition to college for all American citizens. This responsibility had to be discharged taking account of the special language and cultural characteristics of the island, and as the Committee stated, balancing the economic realities of the island's students with the financial possibilities of the College Board. The Committee had actually recommended continuation of the admissions testing program, expansion of the Achievement tests, and strongly endorsed guidance and financial need-analysis services. The Committee also recognized that the cost of College Board services in Puerto Rico could not be financed by student fees alone without running the risk of establishing a substantial additional barrier to education for low-income students. As a way out of this dilemma, the Committee recommended seeking partnerships and external funding for the new programs, but it never doubted that the College Board should stay in Puerto Rico.

But by 1971, the discussion of the fiscal situation of the PRO was much more intense and initially brought up alternative "solutions" that in many ways were extreme. There were elements of a tragic paradox in what happened during these years. On the one hand, the PRO was succeeding in fulfilling the College Board's mission to facilitate transition to college as well as its specific charge to provide services to American citizens in a different cultural and linguistic setting. But this success meant increasing the accumulated fiscal deficit. The Office's fiscal fragility was evident and getting worse.

Why this issue came up with such intensity at this time is open to different interpretations. The stated reason was that the College Board as a whole was going through a difficult financial situation, which made cutting costs in all programs an urgent necessity. But other factors could have influenced the specific actions taken with the PRO. There were major changes in the College Board's senior management with two presidents appointed close one after the other, Arland F. Christ-Janer, in 1970, and Sidney P. Marland, in 1973. It is common that these changes stimulate uncertainty in the organization and questioning of established programs. Also, it could have been that after the Pearson presidency, Bowles's original vision lost some of its force, and the Trustees and senior management began having second thoughts about the extent of the College Board's responsibility toward Puerto Rico. Since the PRO and its programs were in many ways marginal to the overall Board operation, the large and growing deficit would have demanded attention and made the new management wonder what was happening in Puerto Rico that was costing so much. And, I strongly believe that one must not forget the possible influence of ETS as the College Board's major partner and external contractor.

In writing this account, we have debated how much space to give to the discussions that ensued during these years. We have decided in favor of giving a full account because the Puerto Rican education community was, except for five or seven leaders who actively participated in the discussion, never informed about the PRO's financial difficulties and of the possibility of the College Board leaving Puerto Rico. To this day, most people working in education believe that the PRO is and has always been a financially solid enterprise. Setting the record straight is therefore relevant.

1. The integration of ETS and PRO operations in Puerto Rico is considered (1971-72).

The first solution explored to solve the PRO question was a merger with the office which ETS had established in San Juan in 1968. This must have come up early in 1971 since both Fortier and Sims make reference to it in several documents during the year.

In a late 1971 paper²¹ prepared by Fortier and Sims for the Trustees, the issue was squarely faced. Since the foundation of the PRO, it was known that a small population with limited ability to pay would put a financial strain on the

21. A. Sims and A. Fortier, *Notes on the History of the College Board Office in Puerto Rico: Its Present and Future Activities*. (December 1971) 14 pages.

CEEB. The 1969 Planning and Evaluation Committee reviewed this situation and recommended the continuation of the existing programs and the creation of new ones, albeit with reservations about increasing the subsidy. But the fact was that even the original admissions testing program, although continually increasing its volume, was not yet benefiting from economies of scale because the population base was and would continue to be small. Hence the need for a subsidy probably would not disappear in the near future, and if no measures were taken, it would continue to increase. Developing new programs was a double-edged solution unless external development monies were found and continuation contracts secured. Expansion in Latin America faced its own problems, including the need to change the original philosophy of not marketing the PAA. Therefore, Fortier and Sims concluded, “[I]f the above responsibilities are still acknowledged as valid, then the next step is to determine de novo the existing set of priorities and to assess its budgetary consequences.” (P. 13)

In assessing the future directions for the Puerto Rico Office, they called for an improved cost accounting system that would track down specific program costs and adequately allocate major general expenditures and activities. As to the income side of the equation, “the future emphasis obviously should be on sales and services as far as the local educational community is concerned.” (P. 11) They foresaw the continuation with modest annual volume increases of the admissions and the placement testing programs, but with improvements and changes to accommodate the characteristics of new types of students and the tendency toward a more open admissions policy in the private institutions. And they also predicted that the arrival of these new students in larger numbers would increase the need for guidance instruments and services to strengthen vocational decision making and transition to more diversified postsecondary study options.

Assuming that the CEEB would reaffirm its role in Puerto Rico, Fortier and Sims saw three possibilities for the fiscal framework under which the PRO would function, and the consequences of each. (1) The CEEB would set a limit to the subsidy at the existing level in 1970-71. In this case all new developments would require external funding to be secured locally through grants and contracts, from foundations, and from the federal government; (2) The CEEB would set a period of time to gradually reduce the subsidy until the PRO becomes totally self-sufficient. Then a new budgetary and expenditure strategy would have to be implemented, including determining the nature and the style of operation of a College Board Office in Puerto Rico, considering possible reduction in services, in building expenses, and the control and a redefinition or elimination of services bought at ETS; and, (3) the other option, “as has been discussed in principle,” that College Board and ETS join forces to support a common office in Puerto Rico. This would require that both organizations “agree upon basic and common assumptions and purposes. There is no doubt that a great potential for a joint effort does exist.” (P. 14)

The possibility of bringing in ETS to run a joint operation in Puerto Rico was, to say the least, ironic. As we know, back when the founding of the PRO was being discussed, ETS refused to do precisely that. But near the end of 1964, after the initial success with the PAA, the same ETS president suddenly developed an interest in taking over the PRO. President Pearson, who had succeeded Bowles in 1964, rejected the offer outright. And in 1967, not too long after ETS agreed to join forces with the College Board in the international market “as much as possible,” they established an office in San Juan. The stated purpose of this office was to offer consulting services in test development to the state Department of Education and to field-test items for a Spanish version of the GRE to be used in Puerto Rico and Latin America. The Office also handled the registration and administration of the SAT and other mainland CEEB programs in Puerto Rico.

But apart from the irony involved, there were senior staff in New York and perhaps some Trustees, who understood there were good reasons to consider joining forces in the seventies. In a memorandum sent by Fortier to President Arland F. Christ-Janer, dated March 14, 1972, he listed these benefits briefly, and then analyzed the conditions under which a merger could be successful.²²

This memorandum, identified as confidential, was found in Fortier’s personal files at his home. Although the possibility of a College Board /ETS merger in Puerto Rico had been mentioned in other documents, this is the most complete discussion of the topic that we have found. It is interesting that it was sent on March 14, 1972, one day before the Trustees’ meeting in which the PRO financial situation was discussed and the March 15–16, 1972 Resolution was approved (see below). Since the minutes have not been accessible, it is not known if the idea was discussed. But evidently, as the adopted Resolution went in another direction, it was either not presented or rejected.

22. Adolfo Fortier, Memorandum to Arland F. Christ-Janer, *Possible consolidation of CEEB and ETS services in Puerto Rico*, (March 14, 1972), six pages.

In the memorandum's four sections, Fortier analyzed the benefits that could result from the merger, proposed a structure and staff utilization, discussed the financial responsibilities and consequences for both parties, and stated his very strong position concerning ending the existing PRO/ETS partial working arrangement if the merger were not established.

Fortier began with a strange statement: "Presumably, there is already full agreement that some form of consolidation of the services of both organizations in Puerto Rico will be beneficial to all parties involved, especially to the local educational community." (P. 1) The language used implied that he was not fully aware of the course of the conversations or negotiations between the senior managers at both organizations. And mentioning that all had agreed it would be beneficial to all parties, "especially to the local educational community," could have been a reminder of what should be the primary criterion for the merger. He then dutifully identified the benefits the merger could bring, that is, the reasons that must have been considered in New York. Bringing the two operations together **could** substantially increase the effectiveness of both organizations in Puerto Rico, and potentially in Latin America. This would make sense because through consolidation, the technical capacity and operational efficiency would be multiplied. There were myriad opportunities for expanding existing work and creating new programs in areas such as admissions, financial needs analysis, guidance, and assessment of learning at all educational levels.

Fortier then gave his views of how this should be organized to maximize the capacities of both the CBPRO and the ETS office. Although he acknowledged the possibility of a limited agreement to join forces in specific projects, his proposal was to create a new organization, a "subsidiary entity" controlled by both. Until a more formal legal structure could be put in place, an initial joint committee could serve as "advisory-trustee board" with a chairman jointly selected. The new entity's image would stress its affiliation to the parent organizations, but through the use of local professionals and resources, it would create for itself an "indigenous identity" in Puerto Rico and Latin America.

The merged organization would have structural flexibility to avoid the rigidities of the large and complex existing programs, so that it could respond efficiently to educational needs at all levels, including professional and technical education. It would be able to integrate concepts, programs, and professional resources from different existing College Board and ETS programs, which then operated independently. The common use of building space and equipment, as well as the local procurement of services such as printing testing and information booklets, and computer/programming services, could result in more efficient and less costly operations. The technical capability of both organizations could be used more effectively, to provide many services to Puerto Rico, Latin America, and Spanish-speaking communities in the United States. But he was quite assertive as to the role of the CBPRO, which already had a very competent and experienced bilingual staff as well as the contacts with the educational community. Fortier was aware that the ETS office in San Juan had only one full-time professional and that most technical work was handled in Princeton.

The issue of a name for the merged operation had been discussed, and in a previous memorandum it was called "Center for Educational Assessment and Evaluation" (the Center). But Fortier insisted that the name should be in Spanish because it would be serving Spanish-speaking countries, although a translation into English would be useful to identify it with CEEB and ETS.

Fortier went on to discuss the internal structure and distribution of staff in the new entity. It was necessary, he insisted, to have operational integration with unified supervision and direction of all programs and services offered. He proposed four divisions, as follows: test development, test administration, research and statistics, and computer processing. While all test development work should be developed by the local bilingual professionals in both offices (in reality this would be mostly the CBPRO staff), the existing ETS and PRO managers should initially retain responsibility for their respective ongoing programs during a transition period. He went as far as to propose staff assignments from both offices to be supervisors in the integrated units. He proposed that Jorge Dieppa be second-in-command because of his experience, years of service, and academic qualifications. But if the merger was to be implemented gradually and experimentally, then there was no need for such a decision immediately, and he and E. Belén Trujillo, the local ETS office director, could remain in charge of their existing programs and cooperate with the director of the Center to expand programs in Puerto Rico and Latin America. Never said, but throughout the paper always assumed that the director of the new entity would be Adolfo Fortier.

The financial responsibilities and consequences of the merger were more complex, not to say, delicate. The financial situation of the CBPRO was, as we know, not good. But Fortier did not know the financial condition of the ETS office in San Juan or of ETS's programs in Latin America. One thing was, however, clear to Fortier: ETS had to bring

something tangible to the table, such as an investment account to balance the \$1.2 million the College Board had already invested in Puerto Rico and that had produced the tests, programs, and services used in Puerto Rico and Latin America. Of course, both organizations should create an investment account for the new venture. But if only joint efforts in particular projects were considered, then formulas for cost accounting by program for direct expenses, overhead, and promotion could be agreed upon. For example, how much of the Center director's salary would be covered by each partner?

Finally, Fortier considered what should happen if neither the merger nor joint projects "come to a reality soon," in which case, he proposed that the College Board relieve the PRO from buying technical services from ETS. This way it could be in full control of its expenses, buying these services in the open market at a considerable savings from what ETS charges, which was close to \$120,000 annually. Fortier called for a decision as soon as possible, and said, "our strong recommendation is in favor of joining efforts and, ideally, for a full merger of both operations in Puerto Rico," for the reasons expressed previously, to which he added another one: To avoid the potential for competition both in Puerto Rico and Latin America. He then proceeded to remind President Christ-Janer that the College Board owned the copyright to the tests and items developed by the PRO, that it had staff competency and experience to offer services directly to Spanish-speaking communities; and that it had a reputation, prestige, and recognition as providers of assessment and evaluation services on its own, in Puerto Rico and Latin America; and that it received many requests for services outside the Board's traditional mission, locally and from abroad. This was actually saying, "We can go it alone and unlike what happens in the United States, in Puerto Rico the College Board is the brand name, and no one confuses the Board products with ETS."

In retrospect, Fortier's favorable position on a merger with ETS is strange. In a draft of his memoirs, commenting on the rejection of ETS's offer in 1964, and in many personal conversations with this author, he expressed his view that ETS's modus operandi was not suited for a Latin culture. Notwithstanding ETS's technical capacity and prestige, the associational style of the College Board was more in tune with the academic culture of participation in assessment and educational evaluation that prevailed in Puerto Rico and Latin American countries. So he worked intensely to gradually establish an independent technical capacity in psychometrics and test development for the PRO, often bringing in as consultants specific experts at ETS, such as William Bretnall, Cristopher Modu, and William Angoff; but at the same time continually trying to break away from buying scoring, data processing, printing, and other services originally bought in 1963. The final suggestion made in the memorandum on the possible merger perhaps reflected Fortier's strongest convictions on the issue. If my interpretation is correct, then the rather long analysis and proposals that preceded the final section, titled "Full localization in Puerto Rico of the College Board operation," must be interpreted as being dialectic, that is, intended to bring out the contradictions and to ultimately negate the proposal.

The merger was not discussed, or if discussed, not approved, in the College Board Trustees' March 15–16 meeting. We do not know if this was due to Fortier's memo to Christ-Janer. But we do know that the Trustee Committee on Finance had called for a review of the PRO operations due to the increasing subsidy, "not with the intent of evacuating the program but for the purpose of instituting measures to keep the financial burden at a minimum and to bring activities other than the admissions testing program to a self-sustaining basis." What the Trustees did approve was a Resolution on Puerto Rico Office Operations that set forth stronger guidelines than the 1969 Planning and Evaluation Committee's rather mild statements about the limited capacity of the College Board to provide future subsidy to the PRO.

This Resolution of March 1972 embodied the specific recommendations made in a revised version of the December 1971 document, which senior management presented to the Trustees as "Information" for their discussion.²³ It was identical in the historical and descriptive sections but had updated the fiscal situation, emphasizing the more than \$1.2 million cumulative subsidy from 1962–63 to 1971–72. The report reaffirmed the College Board's responsibility to serve Puerto Rico and, at the same time, asserted that there should be limits to the allocation of funds to the PRO operation, and that efforts should be directed to recover all direct and indirect costs in the near future. The PRO deficit had grown faster from 1967–68 to 1971–72, in spite of the Planning and Evaluation Committee recommendations, or one could say, as an unintended consequence of their recommendations, a walloping 140 percent in five years. The reason being that the new Achievement and Advanced Level tests, whose initial development was paid for partially by the Puerto Rico Department of Education, had increased the expense

23. CEEB, Board of Trustees *Review of History and Policy with Respect to Puerto Rico: Recommended Policy for the Future*, March 15–16, 1972, 7 pages.

base without bringing in more income. In a later version of this report, written on December 6, 1972, the estimated deficit for 1972-73 was estimated at \$314,000, which meant that the deficit increase as compared to 1967-68 was a phenomenal 208 percent. Indeed, there was reason for concern.

In the approved Resolution, the Trustees again recognized the CEEB's responsibility to provide educational services in Puerto Rico consistent with its charter and objectives; and they acknowledged that the admissions services offered by the PRO in Puerto Rico were an integral part of the mainland College Board's admissions services, adapted to the local circumstances. Having stated these fundamental principles, the Trustees resolved five policy guidelines to deal with the fiscal situation.

1. The Board's financial burden for providing services in Puerto Rico, if any, must be kept to a minimum, "and that all possible ways be explored to make the program ultimately self-sufficient"; and
2. That services other than the admissions testing program must recover all direct and indirect cost; "and that services which cannot be so operated **will not be started or will be discontinued**"; (bold mine) and
3. The applicability of the Puerto Rican experience for continental Spanish-speaking students should be explored; and
4. That services designed for Puerto Rico, especially the ATP, may be extended to Latin America "on a cost reimbursement basis wherever they are desired and deemed educationally relevant"; and
5. That special efforts be made to get funding from foundations and other sources for "the kinds of special studies and pilot demonstrations that the College Board could most usefully sponsor in Puerto Rico."

This Resolution provided a clear framework for the PRO operation and signaled the intention of putting an end to the subsidy. The most difficult item was the prohibition of starting new programs if they could not recover all direct **and** indirect costs, and the order to discontinue any program, other than the ATP, that could not fully pay for itself. But the real situation in December 1972 was that the FY1971-72 was projecting a deficit of \$245,000 dollars, and that in the projected budget for FY1972-73, the four Puerto Rico Office programs: ATP, Advanced Level, Guidance (New), and Latin American Activities, all showed some deficit. Although to be fair, the directors in San Juan were convinced that external funds would be coming for developing the Guidance instruments, as it did some months later.

The Resolution prompted the Standing Committee of International Education, one of several College Board advisory groups that represented membership special interests, to send a statement to the Trustees on December 1972. The SCIE expressed their view that the Trustees' specific directives to the Puerto Rico Office were contradictory to the spirit of their acknowledgment of the College Board's responsibility toward Puerto Rico, particularly the directive that any program which could not recover all direct and indirect costs should be discontinued. The Committee expressed its fear "that strict adherence to it could result in serious damage to the programs of the Puerto Rico Office and, by extension, to the College Board's efforts to involve itself in international education." (Statement by Standing Committee...December 1972, P. 1) Interesting enough, the Committee argued that all of the work conducted by the PRO was international in the sense that Puerto Rico had a different culture and language. The Committee was, of course, quite correct in one of the meanings of the word "nation," as a matter of fact, its original meaning before it was identified with an independent state. And the Committee went one step further, perhaps previewing the impact of the policy on the emerging office of international education: "it is simply unrealistic to expect that the College Board's international activities will compete with its domestic ones in terms of self-sufficiency, given their far lower volumes."

The Trustees' Response was firm and to the point: They acknowledged the importance of the activities conducted by the PRO, accepted their close relationship to international activities, and the importance they gave to international activities in general, but they reaffirmed their responsibility to preserve the financial health of the whole organization:

As the Committee undoubtedly appreciates, these are times when the College Board must make rigorous examination of the efficiency and effectiveness of all of its services and will likely have to make difficult decisions concerning spending limits, and even the continuation, of what had been considered important services....[so all] programs of the College Board must be moved toward self-sufficiency. (P. 2)

Nothing much seemed to be happening after the March 1972 Resolution concerning what we have called “the Puerto Rico Office question.” As we shall see in another section, there was intensive work going on at the Office on many different fronts. Emergency measures were taken to reduce the deficit. Fortier spent much of his time seeking external funds for new developments, such as the Guidance Program which had been recommended by all previous committees and external studies, and a Credit-by-Examination proposal. But really, the question of the future of the PRO was on a holding pattern during most of 1972-73, and sooner or later, as airplanes, it would be necessary to land. As a matter of fact, near the end of the fiscal year, Albert Sims asked T. Felder Dorn to visit the PRO and report to him on several aspects of the operation. One of them signaled that “the PRO question” was alive in New York: Felder should report his views on how far and how fast the Board could move toward complete local support of its activities in Puerto Rico. Felder Dorn’s report, submitted on May 10, 1973, was very complete and his judgments were quite honest and dramatic.²⁴

The visit had five major objectives: (1) study the extent to which the College Board was making full and effective use of resources in Puerto Rico; (2) study how the CEEB could move further toward complete local support for its activities in Puerto Rico; (3) examine the organization and utilization of personnel in the PRO to determine future staffing needs; (4) study the ultimate viability of the College Placement/Credit Program being planned; (5) study whether or not current (ETS) arrangements for handling “mainland” College Board Programs, such as the SAT and PSAT/NMSQT in Puerto Rico, were reasonable and satisfactory.

Felder Dorn’s report was a thorough analysis of the operations in the PRO. He described the six existing programs and made a critical review of the planned CLEP-type program. He prepared organizational charts, flow graphs, and clear and succinct descriptions of how the work was conducted. He pointed out that except for some psychometric analysis and printing test booklets contracted with ETS and the centralized administrative functions conducted at NYO, the PRO was pretty much self-contained. It conducted all its test-development work, organized and coordinated all test administration activities for its programs, including registration, delivery and retrieval of test materials to and from schools, coordinating scoring and sending individual and school score reports. This work was done by a staff of 18, loosely organized into 4 functional units, with some temporary staff brought in during registration peak periods and the regular staff often used as needed outside of their regular unit. The PRO also carried on many of the functions of a regional office providing direct support to schools and colleges through workshops and meetings, marketing its programs and providing information about them. And Felder Dorn also recorded that the PRO provided information to students and schools about the SAT, PSAT/NMSQT, AP and other College Board programs, although registration for these was handled by the local ETS office. In addition, the PRO coordinated PAA testing for close to 15 institutions in Latin America and the University of Texas at el Paso, and conducted workshops, support technical visits, and consultations in the region. Felder Dorn did not have any major negative observation as to the operation’s efficiency and effectiveness.

But there were several important observations about the fiscal situation that were of the essence for “the PRO question.” Folder Dorn was quite emphatic and clear on this, the main issue from New York’s perspective. His first finding was that the PRO was not going to achieve self-sufficiency in 1973-74 or 1974-75. The best hope was for 1975-76. There had been a deficit reduction in 1972-73 and another projected for 1973-74, but these were based on emergency measures such as not developing new test forms and reprinting old forms instead. But doing this was not healthy for the programs and it cannot become a regular procedure. The other major factor in reducing the deficit was a credit from the International Education Offices for work in Latin America, which simply taxed that Office’s own budget.

After this realistic appraisal of the situation, Felder Dorn recommended that senior management hold Fortier and Dieppa to a firm commitment to be self-supporting by 1975-76. The PRO should by then cover all direct costs for its programs in Puerto Rico, any work provided at ETS, and printing or other direct costs in New York. However, no associational and administrative cost in New York should be charged to the PRO. The specific measures for achieving cost reduction should be left to Fortier and Dieppa, as he did not feel that he knew enough about the operation. But he did recommend cutting down contract work at ETS, computerization of some of the clerical tasks related to test administration, and that the College Board should provide whatever help the PRO requested during the transition to self-sufficiency.

24. T. Felder Dorn, *Report on a Visit to the College Board Office in Puerto Rico: Addressed to Mr. Sims*, May 10, 1973, 10 pages and several annexes.

One major cost of the PRO operation was the work conducted at ETS. Dorn felt that this should be shifted to Puerto Rico but in a two-year transition period, beginning immediately and ending in 1974-75, so as not to endanger the quality of the programs. The College Board's senior management should request that ETS cooperate with this transition providing technical assistance, such as the drawing up of specifications for the local providers and that its test development and statistical staff review the work done on the island, perhaps on a continual basis after the transition. The PRO should contract with ETS for item review through 1975-76.

One of the strategies which Fortier was implementing to meet the March 1972 Trustees' resolution was to seek external funding to develop new programs that could in turn become sources of income when operational. As we explained in the previous section, one of these was a College Credit-by-Examination program which would add five new tests to the three original Advanced Level tests. All the tests could be used in the Advanced Level offerings for high school seniors but also under the credit-by-examination modality for working adults and for active college students. The development cost was estimated at \$150,000 and Fortier was diligently requesting support from the local community. The Association of College and University Presidents had committed half of that amount, and there were good possibilities from other sources.

Based on this possibility for securing complete funding, Felder Dorn cautiously recommended approving the project to the extent that outside money was there. If the total sum was not initially secured, then the project could begin with a smaller number of tests. But he did raise the question: "Is the volume there?" and warned that perhaps more documentation should be required from the PRO, and that in any case, there was always a risk involved.

Felder Dorn had the opportunity to look briefly into the ETS office in Puerto Rico and the possibilities of collaboration between it and the CBPRO. He saw the major benefit that could ensue from collaboration in terms of presenting a united front rather than competing for business. His major observation was that they were on a collision course because they were competing in the same limited market represented by the Puerto Rico Department of Education and the small number of higher education institutions. He did not see much potential for collaboration beyond that which was strictly necessary because of the interdependence of College Board and ETS in the United States. He recommended "that there be an officer directive on the CEEB/ETS relationship in Puerto Rico as soon as possible." (P. 10)

2. The Trustees challenge the Puerto Rican education community with the possibility that the PRO would cease to be part of the CEEB (1974). An ad hoc committee proposes a working solution to the crisis, acceptable to all (1977).

The challenge. Probably the Felder Dorn visit and report was instrumental in bringing "the Puerto Rico Office question" to a critical point, and it must have helped define the position that the College Board's senior management was soon to take on the issue. In December 1973, recently appointed President Sidney P. Marland expressed his support for the Trustees' Resolution of 1972 and requested his staff to prepare a new position paper to move ahead even further. In March 1974, he recommended, and the Trustees approved, a resolution that authorized the chair to appoint an ad hoc panel to consider "the desirability of transferring to an appropriate body on the island proprietorship over the programs, services and other activities of the College Board in Puerto Rico." At the same meeting, they approved an increase in the PAA from \$12 to \$15.²⁵

This drastic move by President Marland and the Trustees was not completely unexpected to Adolfo Fortier. Early in January 1974, he had been sent a position paper, prepared by Albert Sims, that probably contained this as a preferred alternative for solving the PRO question. We say probably, because we have not found the position paper, only Fortier's response to it. It was not a well-thought-out response, which he acknowledged, and reading it one gets the feeling that Adolfo felt, to say the least, quite disappointed. Not having other sources, one can only speculate about the reasons behind this decision. Felder Dorn's assessment that the improvement in the deficit situation after the 1972 Resolution was artificial, that there was no way that the PRO could achieve real self-sufficiency in 1973-74 or in 1974-75, and that the best hope was for this to happen in 1975-76, must have produced quite an impact. But from another perspective, this Resolution could have been a strategic move to send the strongest signal possible to Fortier

25. We only found the summary of the action taken by the Trustees, so we do not have the full resolution with the usual background information. See: Board of Trustees, March 1974, *Summary of Actions Taken at Meeting of March 25-26, 1974*, one page.

and to the Puerto Rican educational community, that self-sufficiency was an irreversible goal, and that they had to take full responsibility for achieving it.²⁶

Fortier's response, dated February 8, 1974, was sent to President Marland, Vice President Sims, and Marv Ludwig.²⁷ Fortier presented his commentaries "not in any particular or logical order and only for the purpose of helping us think through some of the problems and alternatives with reference to the CEEB operation in PR." He first raised a question concerning policy: Was the CEEB still viewing the PRO operations as part of its overall admissions services responsibility? Then he asked if a distinction was being made between the admissions testing program and the other PRO services that in March 1972 the Trustees said should be self-sufficient; and wonders what is meant by keeping to a minimum the financial burden that the Board was willing to assume while affirming its responsibility to provide needed educational services in Puerto Rico. Referring to "the so-called subsidy," he asked, "[W]hat could the Board consider, as a matter of principle, a minimum commitment to the Puerto Rico educational community[?]" Fortier's language was interesting: he referred to "the so-called subsidy," and uses the phrase "as a matter of principle" twice. Knowing Fortier, these words were ironic. To him there was no subsidy because that assumed that the PRO was not part of the CEEB and that Puerto Rico was not part of the United States. To him, there was one single responsibility for facilitating admissions to American citizens. And there were other important issues of principle beyond self-sufficiency. As the Advisory Committee on International Education wrote later in a second resolution to the Trustees: "The Committee asserts that it is a question of educational integrity: Should not financial decisions honor the integrity consistently displayed by the CEEB in offering its services regardless of a student's residence, race, or economic condition?"²⁸

Fortier then went on to raise other questions and suggested exploring other possibilities. If the position is that there will be no more subsidies, not even for the admissions testing program, the CEEB should visualize the very negative consequences of executing this measure immediately, and allow for a transition period. He argued vehemently against transferring the PRO programs to a local group. With the PAA fee increased to \$15 and other measures to cut costs, it was possible to balance the budget and to maintain it that way. Why then, couldn't the College Board retain managerial responsibility for the operation? The Board would be able to run the operation better than any local group that had less experience. Evidently Fortier became somewhat defensive at this point.

But if the full transfer was to be decided, then there was the question of whether it could be done in 1974-75 as the Resolution implied. It would be better that this be a transition year to have time to think about local options. A full transfer would require agreements on many legal, financial, and operational issues, which most probably could not be settled before 1975-76. In looking for a local alternative, it should be clear that a government organization like the PRDoE or the CHE were not independent enough. Perhaps a private nonprofit corporation should be created with its own policy board, with or without College Board representation. The College Board could then donate the proprietary rights of the programs developed by the PRO to the corporation that would assume all existing CEEB obligations in Puerto Rico. The composition of the first local board would be very important since it should be self-perpetuating. Fortier suggested three local education leaders: one from the Council of Higher Education, another from the Association of University and College Presidents, and the third from the presidency of the University of Puerto Rico. The two others would be from the College Board, perhaps one vice president and a distinguished educator from the membership.

It is significant that if the separation was the established solution, Fortier wanted to retain substantial ties with the CEEB. It was more or less clear that separation of the PRO from the College Board was not a reasonable solution to Fortier and, as we shall see, to no one in Puerto Rico's educational leadership.

26. Several years later, in March 1981, Albert Sims suggested this explanation in a meeting of the Advisory Council to the Puerto Rico Office: Mr. Marland in part engineered the question to test the response from educators here. He asked if the Puerto Rican enterprise that the College Board now sponsors ought to be more under the control and direction of Puerto Rican educators themselves. Sims' interpretation is not that different from our own.

27. Adolfo Fortier, Memorandum to Messrs. Marland, Ludwig, Sims, *Reactions to position paper with respect to Puerto Rico*. (February 8, 1974) two pages.

28. Advisory Committee on International Education, *Resolution to Board of Trustees of the Advisory Committee on International Education*. Subject: Puerto Rico Office, April 1974, two pages.

An ad hoc committee meets the challenge and rejects separation. The Ad Hoc Committee established by the Trustees in their March 1974 Resolution was immediately appointed in April and met for the first time in San Juan on May 20. President Marland and Trustee Chair-elect Kennamer attended. Its name was changed to: Advisory Panel on the CEEB Puerto Rico Office. It was a large panel, and as the situation demanded, it was a high-level panel. The Secretary of Education of the Commonwealth of Puerto Rico, Dr. Ramón Cruz, chaired the group. Dr. Lorin Kennamer, chair-elect, represented the Trustees. The other members were recognized leaders in the education community, and in one case, in the financial community: Prof. Hector Álvarez-Silva, director of planning and development, UPR Río Piedras Campus; Dr. Augusto Bobonis, vice president for academic affairs, Inter American University (and the former chair of the first PAA Committee in 1963); Mr. Rafael Fábregas, partner in charge, Peat, Marwick, Mitchell & Company; Dr. Pedro González-Ramos, president of College of the Sacred Heart; Dr. Luis González-Vales, executive secretary, Council of Higher Education; Mrs. Ana G. Méndez, former president and current adviser, Ana G. Méndez Foundation (and member of the 1969 Planning and Evaluation Committee); Pedro José Rivera, professor of education and former Chancellor UPR Río Piedras; and Mr. John E. Shappell, superintendent, Robison School.

After their first meeting at which Marland and Kennamer explained the charge and the CEEB position, the panel appointed a committee to examine possible solutions and options, and to prepare a report for the full Panel to consider. The committee held several meetings (June 6, August 1, 9, and 28, and September 23), with Fortier and Dieppa, and a final meeting of the whole panel to consider the report, which was presented in New York to President Marland by the panel chair, Dr. Cruz, and Dr. Rivera, who chaired the committee and who researched and prepared the draft of the report.

The Advisory Panel's final report was thorough and responded to the Trustees with dignity, clarity, and specific proposals to avoid the separation of the PRO from the CEEB. As it accepted the goal of self-sufficiency, it diplomatically rejected any insinuation that it had been a free ride for the PRO, and politely reminded the Trustees that the Puerto Rico educational community had also invested in the CEEB's programs in Puerto Rico. Its recommendations were well grounded, straightforward, and viable.

The Panel itself summarized its six major recommendations near the end of the report, as follows: (1) No independent status for PRO at the present; (2) Continue financial economies already in effect; (3) Maintain a general balanced budget locally; (4) Help from CEEB for securing external funding; (5) A three-year transition period to evaluate future relations; and (6) establish a permanent Advisory Council.²⁹

But to fully understand these recommendations and their importance for the solution of the crisis facing the PRO, we have to examine them more carefully. The Report began with a brief historical summary of the development of the College Board activities in Puerto Rico and the reasons behind the establishment of the PRO in 1963. It noted that from the beginning and through several statements during the previous 10 years, the CEEB viewed the activities in Puerto Rico as an integral part of the College Board's national service because Puerto Rico was part of the United States, and Puerto Rican students are American citizens. The growth in programs and services had been possible through the initial and continued CEEB funding, and through the support provided by the Puerto Rican educational community. For example, the Achievement and Advanced Level tests were possible thanks to a grant-contract of \$100,000 from the Department of Education and at the time of the report, \$150,000 had been raised for the credit-by-exam program, and there were strong possibilities that the Department would sponsor the development of guidance instruments and then become its major user. The report goes on to recognize the substantial contribution made by the CEEB to education in Puerto Rico. The admissions testing services are now so integrated to higher education on the island as to be indispensable. The financial aid study conducted by the Board under a contract with the Council of Higher Education, the Guidance Study recently conducted under a small grant from the PRDoE, the financial aid study for the UPR System, were examples of the high professional esteem that Puerto Rico holds for the Board and became important contributions to the development of education in the Commonwealth.

In addition, the use by prestigious Latin American institutions of the PAA and the technical aid provided to several countries and national systems of higher education had also grown in volume and impact. Latin American activities

29. Advisory Panel on the CEEB Puerto Rico Office, Memorandum to the Board of Trustees of the CEEB, *Final report on relations between the Board's Puerto Rico Office and the College Entrance Examination Board*, October 2, 1974, 11 pages.

based in the PRO had made important contributions to higher education in the region and had increased the College Board's international presence and image, even though income from these activities was limited.

The Advisory Panel then recognized that these accomplishments "have been possible mainly because of the Board's technical capabilities, operational style, and high standards of service." And it praised the College Board's associational approach that gave full participation to the schools and higher education institutions and its disposition to adapt its programs and methods to the different cultural and educational circumstances of the island. The panel recognized the Board's continued interest not only in starting, but also in developing to its present stage such a program in Puerto Rico.

The panel then considered the financial difficulties facing the PRO. It was obvious that the major reason for the deficit was the rapid development of new programs and services that increased staff and expenses without a corresponding increase in income. The spirit of service had prevailed and these programs should be seen as an investment in one sector of American education particularly deprived, and fully justified within the mission of the organization. But the panel agreed that the financial situation must be brought under control. The PRO had taken measures to reduce expenses and was proposing a balanced budget for 1974-75. In an included income/expense graph presenting the actual financial situation since the foundation of the PRO, it was shown that the deficit had decreased from \$221,000 in 1971-72 to \$29,000 in 1973-74, and that a \$16,000 positive net was projected for 1974-75. This meant that the economy measures mandated by the March 1972 Trustees' resolution were working. The Panel expressed its conviction that self-sufficiency was viable by maintaining and improving upon these cost-cutting measures and increasing income with the Guidance Program, which was expected to be supported by the PRDoE, and new growth would be possible by taking full advantage of the great potential existing in Latin America for the PAA, "given the necessary promotion."

The panel understood that during the May meeting with Marland and Kenamer, it was clear to all that if the PRO could balance its budget, all options were open as to the relationship with the CEEB, "from that which now exists to some form of independent status, perhaps association with the Board in some manner." (P. 5) In other words, senior management and the Trustees were not set on complete separation as the only solution. Thus the panel expressed its interest in developing new guidelines to strengthen and redefine the relationship between the CEEB and the PRO, because:

It is of vital interest to the future development of higher education in Puerto Rico that the intellectual and financial investment already made in this endeavor by the Board, as by the local educational community, be preserved, improved, and continually put to use.
(pp. 5-6)

The report presented several reasons supporting their contention quoted above. For one, Puerto Rico's system of higher education was not a foreign model but typically follows the model developed in the United States. As such, it is fully integrated into the American system, for example, in the accrediting process and through the academic, disciplinary, and professional associations. This integration was also fully recognized by the federal government's programs for education that have been extended to Puerto Rico. In that sense, it was only natural that the CEEB's idea and approach to admissions and placement was extended to Puerto Rico, albeit with the needed adaptations to the cultural and linguistic situation. Consequently, the panel strongly rejected separation as an option for the PRO.

The panel brought up other reasons in support of the PRO remaining integrated to the College Board. They argued strongly, and one could say, correctly, that the PRO could and should play an important role in supporting the College Board's attempt to extend higher education opportunities to the Hispanic minorities in the United States. They foresaw that emerging social and political pressures could very well stimulate the Board to develop special programs adapted for a growing minority with a different language and cultural background. The availability in the PRO of a group of bilingual test-development specialists, well-trained in renowned American institutions, and with experience in providing high-quality programs in international and intercultural settings should be considered an asset.

The Advisory Panel conceded there were valid reasons for changes in the general management and supervision of the programs in Puerto Rico but argued that these are independent of the policy decisions concerning the relations of the PRO with the mainland College Board. These changes needed to be based on a plan and, by their nature, would have to be gradual. The panel and the local management agreed that a balanced budget was a must for 1974-75 and that the PRO could not expect any subsidy. But the panel requested a special *modus operandi* for the admissions testing

program and that the College Board consider keeping for a while some of its current responsibilities. There were two facts that needed to be acknowledged: Puerto Rico was an economically deprived area by national standards, and it was different culturally. Test fees could not be raised beyond a certain point, and the population base was substantially smaller. Even if the rate of high school seniors tested by the PRO was considerably higher than the rate tested with the SAT in the mainland, the volume would always be small, and the number of fee-waivers in Puerto Rico was proportionally higher than that in the States. The College Board mainland staff should be diligent in searching for foundation funding for programs in Puerto Rico to offset the circumstances described above.

The willingness of the CB to transfer proprietary rights to Puerto Rico is pertinent and correct. The panel saw it as

“A recognition of the investment made by our educational community in helping to develop the existing programs. It is also clear evidence of the Board’s continuing deep concern for and interest in the educational welfare of Puerto Rico. This proposal must always remain at the forefront of future discussions.” (p. 7)

A solution is proposed. Having taken the position against an immediate separation, and having argued for a continued relationship benefiting both the CEEB and Puerto Rico, the panel goes on to propose a transitional period of three years to give both parties time to evaluate better the ways and means by which the CB could continue to operate on the island. This was, in fact, a strategy to buy time to allow the PRO to balance its budget under the strict control of the CEEB and the guidance and supervision of the local educational community. Thus, the panel accepted that during the transition period the Board should take whatever measures it deemed necessary to establish effective fiscal control of the operations in Puerto Rico, and also proposed the appointment of a formal advisory structure to channel the input from the educational community.

As proposed by the panel, the new body, to be hereinafter referred to as the Advisory Council, would really have more substantial responsibilities beyond channeling input. The council would have seven members, five representing the local educational constituencies, one Trustee representative, and a College Board vice president. Its functions were advisory and supervisory, as the panel evidently wanted to convey a sense of security to the Trustees and of support to the PRO staff. The initial agenda would be to have an overall plan or design for the transitional period. This plan should identify activities and initiatives that had to be taken in support of the goal established for the PRO. New areas in education where the Board’s services could be used needed to be identified and evaluated as to their viability, maintaining a good balance between its educational importance and the financial consequences.

The Advisory Council should also oversee the local staff efforts to get external funding. A most important function was “to help set guidelines for the management of the PRO, and with the technical advice of the Board’s staff, approve regulations for the formulation and execution of the annual budget, including special accounting procedures for the local operation” (p. 8). Evidently, the influence of Mr. Fábregas, from Peat Marwick, was important to achieve the financial goal established for the transition period. The last function established for the proposed Advisory Council was to evaluate the measures implemented during the three-year transition period and to make recommendations for whatever changes it deemed appropriate and beneficial in a continuing relationship between the CEEB and the PRO.

The panel closed its report, expressing their hope that there would be a better understanding between the College Board on the mainland and the Puerto Rico Office, and that the president and the Trustees would find that the report’s suggestions were viable alternatives to strengthen and improve the Puerto Rico Office.

It must be said that the committee chosen by the Advisory Panel was able to come up with a workable solution to the problem handed them by the Trustees. We know that most if not all the recommendations were accepted. Certainly their strategy of requesting a three-year transition before deciding on a more permanent solution did buy the PRO time to improve its finances along the guidelines established by the Trustees. Although not devoid of difficulties, the following years saw the strengthening of the PRO’s operations in Puerto Rico and Latin America.

The Advisory Panel, as we have seen, presented its report in October 1974 and its recommendations were accepted by the Trustees in December of the same year.

The new permanent Advisory Council met for the first time on May 23, 1975, one year after the ad hoc panel had initially convened. The new body was smaller but had some returning members. In a way its work was spelled out by their own October report, so they worked promptly and intensely with Fortier and Dieppa. The minutes of the frequently held meetings show their diligence and commitment. In February 1976, the council submitted a report

to the Trustees; in November 1976, President Marland visited Puerto Rico, and in September 1977, the Advisory Council presented what it considered the final transition report and, which accordingly, had more definitive recommendations on the relationship between the College Board and its PRO. During the almost three years that had elapsed between the ad hoc committee's report of October 1974 and the Advisory Council's report of September 1977, the PRO had undergone a positive transformation under the watchful guidance of the voluntary local educational leaders of both panels.

To give proper closure to this veritable institutional crisis in the relations between the CEEB and its Puerto Rico Office, it is relevant to examine briefly the report submitted to the Trustees in February 1976 and, in more detail the final transition report of September 1977.

The February 1976 report to the Trustees summarized the changes achieved during 1974-75 and 1975-76. Under the advice of the Advisory Council, the Office was reorganized into three better-defined units: Test Development, which included all test development, statistics, and research for all the programs; Test Administration, which handled the physical production of tests and test-related materials such as brochures and registration, and coordinated the test administration process; and Program Management, which conducted the local management and administrative functions in coordination with the NYO and under the supervision of Fortier and Dieppa, who handled the high level contacts with the educational community. Each unit became a cost accounting center and the budget control function was strengthened. The processing of test applications and the handling of fee payments sent by the applicants had also been improved. Also, recommendations were made and implemented to improve the Office's filing system and its procurement practices.

What the Advisory Council reported as the most important change was that the goal of financial self-sufficiency had been met. In 1974-75, for the first time in its 12-year history, the income received was more than expenses, by a solid \$144,000. And this positive net amount was projected to increase for 1975-76 and 1976-77. Based on this improvement, the Advisory Council recommended changes to the 1974 agreement. The most substantial was a strategic redefinition of the "self-sufficiency" goal. Attainment of self-sufficiency should be on a linear cumulative basis instead of on an annual basis. This meant that beginning in 1974-75, the excess of income over expenses would be accumulated every year so as to "cover" possible future deficits. This was not, we must assume, a real accumulation of funds from one good year to the next. It was more of a "virtual" accumulation so that deficit years would not be counted as transgressing or violating the Trustees' balanced budget requirement. The Trustees approved this recommendation which undoubtedly proved that they were pleased with the progress achieved after the Advisory Council began functioning, and were willing to support the PRO. They established, however, these conditions: "(a) budgets for any current and at least two forward years would be available, reviewed and approved for Puerto Rican-based activities; (b) when the cumulative "net" at any latest year-end showed a deficit, this deficit would be eliminated in the projections for the following year; or in any event, the following two years; (c) proposed expenditures from the actual (not projected) cumulative "net" would be reviewed and approved by the central office it being understood that proposed expenditures for research and program development need not be judged by overall College Board priorities for such expenditures; and (d) should the cumulative "net" be more at any time than would appear necessary for its several purposes, it might be used to reduce student fees or for other mutually agreed purposes."

The council made two other recommendations, which were also positively received by the Trustees as long as there was local money available. One was that financial planning should include a margin for conducting studies to improve management practices or to collect special data on the local programs; and the other, calling for the College Board to support more in-house research on access to postsecondary education and to provide more information on vocational and career education in the near future. On the possibility of the College Board funding research in Puerto Rico, Vice President Sims had already said in the council meeting³⁰ that the research funds were assigned according to national priorities and consequently there was no assurance that proposals from the PRO would be approved. The Trustees' Executive Committee also specified that the cumulative "net" could be used for Research and Development activities peculiar to Puerto Rico. Since national priorities did not offer much opportunity for the PRO, the committee also decided that projects that could be used by Hispanics both in Puerto Rico and on the mainland, could be funded by a combination of sources: CEEB R&D, PRO net, and external sources.

This position remained in force for many years until the nineties. No research and development funds from CEEB were used for Puerto Rico.

30. ACPRO, Minutes of Meeting May 23, 1975, P. 3

The last report of the transition period was presented to the Trustees in September 1977. The Trustees met in San Juan for the second time in the Board's history (the first meeting was in 1964) and received the report. The council reported that financial self-sufficiency of the PRO was an established fact as projected through 1980. But as one looks at the projections included in Appendix A, there are deficits projected for 77-78, 78-79, and 79-80, a total of \$120,000. How come the report asserted that financial self-sufficiency was an established fact? That's because the cumulative excess of income over expenses achieved in 1974-75, 75-76, and 76-77 totaled \$494,000, resulting in a positive balance for the six years of \$374,000.

The council reported several positive factors that bolstered their position. The number of senior high school applicants for college had been increasing consistently, and there were reasons to affirm that it would continue to grow. Other good news was a 40 percent volume increase in Advanced Level tests taken in 1976-77, and the commitment by the PRDoE to cover the test fee for all public school students and to promote and support participation by more schools and students. But the council expressed doubt that the Advanced Level program, now with eight tests, could achieve self-sufficiency soon. A contract had been signed with the PRDoE to administer the new Guidance Information System instruments (SIPOE) to all eighth-graders. A total of 52,195 public school students and 3,000 from the private schools participated in 1976-77. The contract with the Department assures self-sufficiency for this program, "for the time being."

In its report, the council also stated that local associational affairs were being strengthened and that a permanent forum or Puerto Rican meeting was being established. This would help the integration of the PRO with the educational community. Finally, they reported that Latin American activities continued to have a very positive influence in the region, increasing the CEEB image, promoting and supporting international collaboration and student exchange. Also, income from PAA use in the region, although still small, had been increasing, and should continue to increase. The Advisory Council recommended that these activities of the PRO should continue.

The PRO/CEEB relationship saved through redefinition. In keeping with its commitment to propose changes to the relationship between the CEEB and its PRO at the end of the three-year period, the council presented seven conclusions it saw as guiding principles for the envisioned relationship. The first conclusion was a firm rejection of any separation that would effectively put an end to the College Board presence in Puerto Rico. The council concluded that the PRO should remain within the general association and service responsibility of the College Board and argued that this was better for the organization and for the Puerto Rico education community because its presence strengthened secondary and higher education and offered needed channels of professional and institutional communications.

The council then proposed several other guidelines it considered necessary for the College Board PRO to work effectively in an environment as different and difficult as Puerto Rico. One was, of course, self-sufficiency. Having been assured that financial self-sufficiency was already established, the council went on to recommend self-sufficiency as a guiding principle they deemed "pertinent and necessary for reasons that are self-evident." But for the PRO to be viable and efficient, it must be given some "discretion" to effectively operate in this environment and to respond efficiently to the special nature of Puerto Rico's educational needs. The exercise of these discretionary powers, if one could call them that, would extend to specific local associational and service activities and to the right to perform in Puerto Rico all program operations for Puerto Rico and Latin American services.

In order to guarantee that this discretion was exercised prudently, the Advisory Council should become a permanent body with a revised charge to specify its overseeing functions. Representing, as it did, the local community and the CEEB, it would be able to work closely with the executive staff of the PRO to balance the interests of all concerned. The council defined a functional structure with specific functions that should be exercised by the CEEB and those that should be exercised by the PRO. To keep the PRO viable, the mainland Office **must continue** to provide administrative and technical support in: "(a) program definition, specifications and operational standards; (b) personnel administration subject to local requirements and practices; (c) technical assistance on applied educational research and computer technology; (d) publications assistance as to technical content, design, and editorial standards; (e) management systems advice, contract review, financial record keeping, budgeting." (P. 5, boldface mine) In other words, the council assured the Trustees that the local discretion it had requested was not a blank check, that it was limited. This same concept was reiterated in the sixth conclusion, specifying that personnel practices and policies, as well as the budgeting and finance process should remain within the overall College Board system.

What, then, we may ask, was the local discretion all about? The seventh conclusion specifies five areas where the PRO should have discretion or autonomy, **subject to council review as appropriate**: (a) associational structure and activities in Puerto Rico undertaken by Puerto Rican membership; (b) research and studies done through the PRO budget and reserves, **subject to balance and Trustee budget approval**; (c) pricing of services or publications produced in Puerto Rico for local distribution, (d); new program initiatives and changes in specifications for existing programs, **subject to budget, market, and substantive review by council**; and (e) budget adjustments as necessary within total approved budgets of the PRO. [Bold type is mine]

This mixed bag of local autonomy in limited operational areas and central control of the essential decisions impacting budget was a pragmatic solution to the “Puerto Rico Office question.” The role of the permanent Advisory Council supervising, reviewing, and auditing local management in representation of all the interested parties was crucial in winning Trustee and senior management approval. This amounted to recognition by the Trustees of a unique status to the Puerto Rico Office within the College Board organization. The redefined relationship worked quite well until today and was able to survive when changing external conditions created new financial difficulties.

During the first four to five years, the council, particularly under the chairmanship of Dr. Bobonis, was very proactive in overseeing the activities of the Puerto Rico Office, approving research projects, requesting reports, closely examining budget proposals, and questioning the local management and staff.³¹ Reading the minutes from the council’s meetings, one gets the feeling that it was acting much like a local governing board rather than in an advisory capacity. As an example, in their October 8, 1976, meeting, a discussion ensued concerning the Latin American activities. Fortier had reported a slow increase in test volume and explained some of the difficulties faced in the region. This prompted Chairman Bobonis to express some doubts concerning the justification of continuing with activities not producing sufficient income. Fortier explained that for several years, he had been too involved in dealing with the financial problems faced in Puerto Rico, seeking external funds for the new programs, and had to limit his presence in Latin America, but he argued that since there was no test development cost involved, even with a small volume it was cost-effective. Nevertheless, the council approved a resolution “requesting the Executive Director of Latin American Activities to prepare a comprehensive review of this program” for the council to consider in the following meeting whether or not this program could move at a faster pace than in the past. In the same resolution, the Council also requested the staff to produce demographic information on student population, particularly regarding high school seniors, and to use this data to support budget requests for the next three or four years and to justify research proposals.

But by the early eighties, the Advisory Council’s role weakened somewhat. It became more of a forum for exchange of information on the national College Board programs and educational issues affecting the Board in the States, for a general discussion of developments at the PRO and to receive input on the local needs from the members. One can see in the minutes that it became more passive concerning the administrative and fiscal issues. As a matter of fact, after some time, the fiscal issues were not even brought up for discussion except for increases in test fees. This continued to be so until the late 1980s when the Advisory Council was involved in discussing and approving plans and budgets prepared under my administration.

Throughout the early seventies, the PRO’s first priority was, of course, to establish self-sufficiency. Income was improved, raising the PEAU fee from \$10 to \$12 in 1972 and again in 1974 from \$12 to \$15. Fortier and Dieppa implemented several of the cost-cutting measures that are normally executed in difficult financial situations. The three major expense sources were trimmed down. Staff positions were frozen, and three vacancies that occurred during these years were left open and their responsibilities were distributed among the remaining staff. Scoring and statistical work, which had been bought from ETS since the PRO was established, was slowly transferred to local contractors who offered them at a more favorable cost. Some travel and meeting expenses not strictly required for the operation were eliminated, especially in Latin America. Plans for moving to less expensive quarters were explored and eventually led to relocating to a smaller but better distributed space within the same building. By 1974-75, the PRO was on its way to self-sufficiency.

31. The first Advisory Council members: Augusto Bobonis, special adviser to the president, Inter American University, Chairman; Héctor Alvarez-Silva, director, Office of Planning, Development, and Information Systems, UPR Río Piedras; Juan B. Colón, undersecretary of education, PRDoE; Alfredo G. de los Santos, president, El Paso Community College; Rafael Fábregas, partner, Peat, Marwick, Mithcell & Co., San Juan; John G. Shappell, Robinson School, Puerto Rico; and Albert G. Sims, vice president Programs and Field Services, CEEB, NY. Four of the members were members of the Ad Hoc Committee. Alfredo de los Santos was not identified as a Trustee but probably was.

D. Under its redefined status, the PRO moves ahead to strengthen and increase its services in Puerto Rico: 1975 to 1984.

It should be noted that during the period of uncertainty concerning its future, work at the PRO never lost its intensity as the staff remained fully committed to achieving its objectives. When financial health was established and the new working relation agreed upon by the Advisory Panel and the National Office became operational, the Office was able to move faster and steadily develop the new programs local management had envisioned to better serve Puerto Rican educational needs. From 1976 to 1984, the PEAU admissions testing program continued to grow, serving unprecedented numbers of students and becoming the essential tool for transition to college in the Commonwealth. New programs were developed and soon became key players in the island education environment. Information on student characteristics and interests was substantially expanded and research activities were strengthened, as the Office acquired modest but adequate data processing capacity. In so many ways, during this period, the PRO achieved the highest levels of educational service of its first 25 years.

1. The admissions testing program reaches new levels of service as federal and local financial aid programs stimulate access and college opportunities expand dramatically.

Expansion of access. As we know, the Commonwealth government and policymakers had given high priority to expanding elementary and secondary education during the forties and fifties. High school attendance increased substantially as the base of the educational pyramid became wider. More students completing sixth grade meant more students going into secondary schools and, even with a high attrition rate, more going into and finishing high school. When Operation Bootstrap began bringing in more manufacturing plants that in turn generated new needs for professional services, it became imperative to increase postsecondary opportunities. As financial aid became more available, access began to take off. The expansion of access to higher education in Puerto Rico was phenomenal when one considers that it took place in an essentially underdeveloped economy with a very low per capita income.

From 1964-65 to 1973-74, higher education attendance grew from 36,855 to 88,911, which amounted to a 141 percent increase in 10 years. From 1974-75 to 1983-84, the number of students attending college went from 94,369 to 160,093, a growth of 70 percent. This growth was a superb 334 percent in 20 years, a rate of growth far ahead of all Latin American countries and larger than several of the more developed countries in the world.

The increase in attendance during these 20 years is explainable in terms of the expansion of financial aid available so that the children of poor and middle class families could aspire to college, even to a private institution. As the studies conducted by the College Board had found: The major limitation to increased higher education opportunities was lack of economic resources.

From 1964-65 to 1973-74, the Commonwealth legislature had made more scholarship grants available to deserving students, the federal government introduced several grant and loan programs, and the University of Puerto Rico began establishing the regional colleges along the lines originally suggested by Frank Bowles. In addition to offering low tuition, regional colleges spread across the island, bringing higher education closer to students' homes. But the second phase in this great growth (1974-75 to 1983-84) was the direct consequence, first of the Basic Educational Opportunities Grants and of their continuation and expansion as the Pell Grants program. This availability of federal financial aid has continued to the present, and it remains the essential factor in access to higher and postsecondary education on the island.

Both Whitla and Kilpatrick had warned about the demise of private higher education if more financial aid was not made available to students going to private colleges. Federal grant programs eliminated that danger as they more than compensated for the inequitable local scholarship program that favored the public university system. The participation of private institutions in this extraordinary growth was in itself a defining event in Puerto Rican higher education. In fiscal year 1964-65, there were 12,086 students attending private institutions on the island. By 1973-74 this number had increased to 38,472, a very large gain of 218 percent. From 1974-75 to 1983-84, private college attendance rose another 142 percent, from 42,314 to 102,439 students.

The rate of increase in students served by the private sector during this period was higher than that of the University of Puerto Rico system. The Council of Higher Education (CHE) had made the decision to increase graduate programs and not grow beyond 55,000 to 60,000 students. In 20 years, private institutions became the major providers of higher education, increasing its percentage of the total student population from 32 percent in 1964-65 to 64 percent in 1983-84. Thus, Whitla's and Kilpatrick's best hopes became a reality: With financial aid available, the private institutions became stronger and were able to develop their mission, expanding to other locations and establishing new programs to serve new generations of students.

The increase of opportunity in the private sector, paired with the availability of financial aid, and the development of the University of Puerto Rico regional colleges, removed much of the social pressure for admitting more freshmen to the UPR's two major campuses in Río Piedras and Mayaguez. These could now begin shifting resources into graduate and specialized professional studies whose need was increasing as the economy developed. But the political issue of social stratification at the publicly supported institution did not go away. The UPR administration continued looking for ways to strengthen its admissions process. In 1976, UPR Río Piedras Campus requested technical support to develop a new admissions formula aimed at increasing the number of low-income students entering the campus. But the same year, the office of the president of the UPR System invited Fortier as a consultant for establishing a central admissions process for the system. This issue was part of a power struggle between the oldest and largest campus and the office of the system president. In both cases, Fortier was the only external member of the respective committees.

In October 1979, the University established one single formula for all campuses giving the PAA substantial weight in the admissions decision. The Verbal Reasoning and the Mathematical Reasoning scores would each have 33⅓ percent, and the high school grade point average received 33⅓. Fortier was not happy with this determination that gave excessive weight to the PAA. He had argued that it should not have more than 50 percent. But the university was looking for ways to select the very best students and giving more weight to the PAA seemed to them the most efficient way to do it. During the discussion, the Mayaguez Campus, which was oriented toward engineering and technology, proposed adding Achievement scores to the formula, particularly the ESLAT score, but Río Piedras felt this would give unfair advantage to the private schools. This formula remained in use for many years, in spite of the PRO's recommendations to revise it based on research that showed that high school average was the best predictor. In 1985, as a member of the University System Administrative Board, I heard Fortier present the last validity studies which confirmed that 66⅔ percent was indeed excessive. Several years later, as executive director of the PRO, I found more receptive ears in a different UPR president, and the formula was changed to Fortier's original recommendation.

As was to be expected, this large growth in access in a relatively short time brought new problems. Fortier's warning at his Legislature deposition in August 1973 was both descriptive of what was already happening to some extent, and prophetic of a future where large numbers of students admitted to the universities would require special support to overcome the limitations imposed by their socioeconomic and educational background. The institutions faced a greater challenge, and the College Board was looked upon as a source of information that would allow them to classify the incoming students by achievement levels in Spanish, English, and mathematics in order to place them accordingly in freshman courses or in remedial programs.

Increase in test-takers and score decline. The increase in higher education attendance was, of course, accompanied by an increase in the admissions tests volume. The PRO admissions testing program increased from 1968-69 to 1974-75 by 50 percent, reaching over 33,000 tested students by 1975. During the following 10 years, 1975-76 to 1984-85, it grew over 29 percent. The peak was in 1982-83 when 43,618 exams were administered. By the end of this period, there were signs that the rate of increase was diminishing and the PEAU volume would stabilize.

As the number of test-takers increased, test score averages in all five PEAU tests declined. Evidently, the new applicants were bringing in a wider diversity in abilities and knowledge, which was bringing down the group average scores. Concern with score decline began to get attention from the staff, the academic community, and even from the general press. This interest was probably stimulated by news that the College Board had appointed a commission to study the SAT score decline and the subsequent publication in 1977 of its report *On Further Examination*. The report was discussed soon after at the PRO Advisory Council, and a summary was published as a Supplement in *Academia* (#27, October 1977). Thus, it was only natural that the issue of score decline in the PEAU tests would come up for discussion. One reads in the council meeting minutes of these years a continuous concern with the score decline and requests from the members for more information and for studies to understand the situation.

In response to this rising interest in finding out how the examined population was doing, the PRO staff began collecting and analyzing data from the tests and the information collected in the student questionnaire. The situation was discussed in brief articles in *Academia* (1978, 1982, and 1983). The first article reported that score averages in the two reasoning tests had declined but not as much as the SAT. The SAT score decline, in 15 years (1963 to 1977), was 49 points on the verbal section and 32 points on the mathematical section; whereas the PAA drop, in 11 years, (1967–1977), was 12 points in verbal and 8 in mathematical reasoning. The article declared that the scores were more or less stable and that the drop was not statistically significant. The decline in the Achievement Tests average scores was 12 points in Spanish, 16 points in Mathematics, and 55 points in English as a Second Language. The first two were judged to be not statistically significant but the drop in English was substantial, and it had already prompted the PRO to conduct a study of the ESLAT. Average scores continued to decline as reported in 1982 and 1983. And, by 1985, 19 years after the three achievement tests were added to the admissions testing battery, the score averages had dropped as follows: English decreased 54 points, Verbal Reasoning decreased 19 points, Spanish decreased 15 points, Mathematical Reasoning 9, and Mathematics 8. Once again, the expressed position of the PRO was that the decline, except for ESLAT, was not significant.

Even assuming the correctness of the statement repeated in the articles to the effect that the observed declines in four tests were within the “normal error of measurement,” and apparently not of the same magnitude than the observed decline in the SAT scores (*Academia*, #28, May 1978), the fact was that the score decline was there and increasing, and it was becoming an educational issue. The PRO did not see the need or, perhaps, did not have the resources, to appoint a panel, and commission 27 research studies to find the explanations for this decline, as the SAT had done. So it did two things: it “borrowed” some of the explanations found by the SAT panel, and it intensified its activities to review and strengthen the technical quality of the tests, to provide feedback to the schools about their students’ performance, and to improve the information it provided to the colleges.

The SAT panel report had found no single cause for the score decline. Once research confirmed that changes to the test or to scoring were discarded as explanations, the report discussed two sets of circumstances that in their judgment explained much but not all the decline. The first set of circumstances was the fact that the composition of the test-takers had changed dramatically when opportunities for college expanded in the 1960s. The new applicants had a larger proportion of students with comparatively lower grades, more low-income and minority students among them, and more women who traditionally scored lower in mathematical reasoning (but not in verbal). But, after 1970, another set of circumstances in the schools and in society came into the picture. The panel identified relaxed teaching and standards, too much television, changes in the family role, and “unprecedented turbulence in the nation’s affairs” as negative influences on the test-takers. (Summary of the Report, *Academia*, #27, October 1977)

The first set of circumstances found in the United States was, of course, also present in Puerto Rico, that is, a large increase in test-takers in a relatively short period of time. The SAT panel had found that between two-thirds and three-fourths of the score decline was related to the larger number of test-takers that had not been offered meaningful equality of opportunity in their education. The data examined in Puerto Rico was similar; more of the new applicants came from lower socioeconomic levels and were educationally deprived, so this became the major explanation used in discussing the PEAU score decline.

As we already know, the Achievement Tests were required by all institutions, but they were used mostly for placement in freshman courses and not for admission. However, educators and the press interpreted the decline as evidence of the failure of the public school system. This interpretation was stimulated by the fact that the private school students, **as a group**, were doing substantially better than the public school population. The difference in the average scores between the two groups was close to or above 100 points all tests. It was often necessary for the PRO to come out against making judgments about the quality of schools and comparing types of schools based solely on the test scores. In an article in the *San Juan Star* (February 21, 1982), Fortier was described “as being strongly against these comparisons because, among other things, the private school starts out with a tremendous advantage by the very fact that it is selective,” it has less students per school, and its whole population is much smaller than the public school population (1 to 9). But more important, the article quoted data from the PRO which suggested the important role played by the socioeconomic factors. “In both types of schools, private and public, achievement test results rise and fall in direct proportion to the income of the groups they serve.” In addition to student background, there were also differences in the prevailing conditions in the private and the public sector that influenced achievement, such as parental interest, availability of text books and teaching materials, and supervision of the teaching process. But in spite of what this and other evidence suggests, the issue did not disappear and to this day unfair comparisons come up sporadically in the news reports and in some political speeches. The gap in the average test scores between

the two sectors continues but it has been narrowing as private school averages are declining. One possible reason for this is precisely that its population has increased over the years and has become more balanced in terms of the socioeconomic background of its students.

Increasing research to support the tests. As we have suggested, after 1977-78, the PRO intensified its research activities. Stimulated by the Advisory Council, a research plan was prepared. The plan presented in a matrix the data, cross-tabulations, and correlations that were already available and identified what was not available and needed to be worked out. From this matrix, the research priorities were to be established. Preparation and discussion of the plan brought up the need for additional staff with training in psychometrics. Recruiting began soon after and two new staff members were appointed in 1978: Ivonne Hernández and Janning Estrada. When Ms. Hernández resigned, Antonio Magriñá was appointed in 1980. As we will see later, Ms. Estrada and Mr. Magriñá immediately gave needed impetus to test development and research activities. Much of this research was aimed at validating the psychometric quality of the tests and their use for admissions (PAA) and placement (Achievement), but student characteristics and the new programs also received much attention.

Local subject-matter specialists were commissioned in 1977 to conduct content validity studies for the three Achievement Tests. The ESLAT test was the first to be studied because of the large drop in the average score and because the teaching of English always carried political connotations in Puerto Rico. As a matter of fact, a school language bill was introduced around this time, aimed at “strengthening” the teaching of English, and the scores in ESLAT were used as evidence of how bad such teaching was. A study of the ESLAT was commissioned to be conducted by an external English language specialist, Professor Eugene V. Mohr, who was familiar with the test and was a well-recognized expert on ESL. He analyzed items with different observed difficulty levels and which students were answering incorrectly. He did this in order to identify their underlying language structures. He examined the English curriculum and textbooks used in the public schools to find any possible correlations between these and the scores. Mohr’s report was published and widely distributed by the PRO under the title, *Examining the English Examination*, “so that teachers and school administrators can have this information available when adjusting the emphases in their English programs to improve student performance.” Recommendations for improving ESLAT through changes in the types and proportions of items were also included and supported with corresponding linguistic analysis (Mohr, 1978, P. 1). Two other external experts were commissioned to conduct similar reviews of the Spanish (José A. Torres-Morales, UPR-Río Piedras) and Eugene Francis (UPR-Mayaguez) Mathematics. Unfortunately, their reports have not been found.

The same year, the council had approved a proposal that a fully autonomous group of consultants composed of psychometric and subject-matter specialists look into and audit the PRO testing programs. Such a panel should vouch for the integrity and the relevancy of all the programs, taking into account their present use within the educational conditions prevailing in Puerto Rico.” (Dieppa, *Annual Report*, June 1978, Page 3). This external auditing was probably motivated by several factors. One was the combination of increase in admissions opportunities and the increasing score decline, which had the colleges worrying about the quality of the new students and the reliability of the tests. Another was that questions about fairness were beginning to be raised. The fact was that the tests were becoming more important in the transition process, and both the staff and the council wanted to maintain the highest technical standards possible. The Advisory Council meeting of March 1979 received preliminary reports from these consultants: Dean Whitla (Harvard), who supervised and reviewed validity studies in progress; Edwin Herr (Penn State) and Emma Salas (Universidad de Chile), who reviewed the Guidance Information Service; William Angoff (ETS), who reviewed psychometrics and measurement; William Bretnall (ETS), who reviewed security controls in the test administration process; and Edmond Jacobson (CBNYO), who reviewed computer data processing. Although no written reports from these reviews were found, except for the validity studies, there are sporadic references to their recommendations, and some of these show up in much of the work conducted in the following years. The validity studies with freshman classes in all institutions were completed in 1980 and discussed with the individual colleges and at a meeting of the Association of University Presidents in June. It should be noted that the PRO staff worked hand in hand with the external consultants and that consultation with William Angoff continued for many years as he would visit the PRO annually to audit the psychometric work conducted by the Test Development unit. One recommendation stemming from these audits was the need to strengthen the PAA item bank. Since items were written by high school and college faculty members, a one-week workshop was conducted by ETS and PRO staff for 15 item writers in June 1981. Another recommendation was that the spiraling system to distribute tests throughout the island test centers needed to be revised in order to achieve a better sampling of the tested population for experimental and statistical procedures.

Two other technical aspects of the PEAU tests received special attention during these years: possible shifts in the score scale, and the internal structure of the reasoning tests. By 1981, the examined population had increased almost four times when compared to the population used to norm the PAA in 1964, from 11,000 to more than 40,000. Also, whereas in 1964, fewer than half the high school senior graduates were examined in the early 1980s, almost all graduates took the test. But, as we know, it was not just a quantitative increase because many characteristics of the tested group had changed. It was now more diverse in its educational and social background and its vocational interests than when the tests were originally normed. Therefore it was time to do a complete psychometric analysis of the scales to determine if recentering was required. Several analyses were performed essentially by Antonio Magriñá, the PRO psychometrician and William Angoff as consultant. But by the end of the study, it was concluded that it was not needed. The internal structure of the PAA was also the subject of research. This research produced two major findings (Magriñá, *Academia*, #39, August 1983). First, both the Verbal Reasoning and the Mathematical Reasoning tests had a factorial structure quite similar to the specifications developed by the Committee of Examiners. Second, each of the two tests was unidimensional and therefore, each constituted an integral unit of measurement. These two internal studies, together with the external validity studies conducted by Whitla and the psychometric audits conducted by Angoff, confirmed that the tests were good instruments for measuring the intended abilities and providing reliable information on the much larger population tested almost 20 years after the initial norming. Whatever areas for improvements were detected were acted upon with determination and celerity.

Although not conducted by the PRO staff but by Don Alderman from ETS, the study *Language Proficiency as a Moderate Variable in Testing Academic Aptitude* (1981) received substantial logistic and technical support from the PRO because two of its tests were involved. Its purpose was to determine the relation between first and second language and performance in aptitude tests. A sample of 400 students from public and private schools in Puerto Rico were tested with SAT, TOEFL, PAA, and ESLAT. The study was important in that it confirmed that if the language of an aptitude test is not the first language of the test-taker, his performance will be negatively affected to the degree that his second language performance is limited. Indirectly the study also showed a high correlation between the SAT and PAA, and between TOEFL and ESLAT.

Expanding collection of student data to support research on student characteristics. Research is of course related to the amount and quality of the data available. Important steps were taken to increase the amount and relevance of the information gathered about the students taking the admissions tests. When the PAA was first administered, only minimum information to identify the student was asked. But soon it became necessary to collect more information for research purposes and for supporting the colleges in their admissions and placement process. Logistics were no problem because all college applicants had to fill out the test application form, but it had to be voluntary. A questionnaire was prepared following the general concept of the one administered with the SAT, adapting some questions and developing new ones to reflect conditions in Puerto Rico. In November 1975, it was piloted quite successfully as over 19,000 students responded, 86 percent of the total examined on that date. In 1976, the *Cuestionario Descriptivo del Estudiante* (Student Descriptive Questionnaire) was integrated as a regular feature in the admissions testing program. Later it was renamed: *Cuestionario para la Orientación Post Secundaria*, (Post-Secondary Orientation Questionnaire) and immediately became the most important single source of data on students going to college in Puerto Rico.

The Puerto Rican SDQ collected information on several important variables, such as professional inclinations (major field of study), degree aspirations (associate, bachelor's, master's, doctorate), courses taken, family income, parents' occupation, extracurricular activities and interests, and counseling needs in college. Although it has undergone some additions and updating to accommodate changing circumstances, many of the questions have remained unchanged to this date. This made possible a data bank on all college-going students which was, and is still today, unique in the Commonwealth and invaluable for research. Statistical summaries of all the variables were prepared and sent to the colleges for their use. Periodically, staff would conduct analyses of some of the variables as they related one to another, and to test scores and grade point average, which were presented in Academic conferences and/or published in *Academia*.

There were several other important studies conducted during these years. In October 1979, a sample of students who took the PEAU tests was surveyed to explore their perceptions concerning the admissions tests, including what preparation they did, how they felt about the tests, their experience at the testing center, if they had any interest in repeating tests, and their view of the college admissions process. Some 3,090 students from 29 public and private schools participated in the survey. The students' responses were analyzed and provided input to improve test administration and for the colleges to improve their admissions process. In 1979-80, a survey of counselors' perceptions of different aspects of the admissions testing process was completed. The survey covered: registration, instructional materials, information provided for students and counselors, test administration and organization at the test centers, and test scores interpretation. Published in 1980 as *Los orientadores y las pruebas de admisión: resultados de una encuesta*, (Counselors and the Admissions Tests: Results of a Survey), it was distributed to all high school counselors and college admissions staff, and was discussed in scheduled meetings with all private and public school counselors.

Several studies were conducted with the data obtained with the student questionnaire. These were variables studied for the first time in Puerto Rico, and there was no other organization that was able to study them for all the college applicants through an increasing number of successive years. Colleges could collect data on their students, but the PRO had the data for all. The following are illustrative of the studies conducted. In October 1980, a first analysis of several of the student characteristics and how they cross-related was published in *Academia*. It showed the relation of family income, high school grade average and test scores; genre and fields of study preference; genre and occupational expectation; type of school and plans for graduate studies. In March 1983, Magriñá delivered a paper on "The effect of candidates' sex in the College Board tests scores" in the "Conference on Women in the Western Culture and their Contribution to Higher Education," which took place in San Juan. In December 1985, Dieppa and Magriñá published a more complete analysis of preferences for field of study relating this with all the other variables for which the SDQ collected information and with the test scores (Suplemento Técnico, *Academia*, #46). The data analyzed came from the October 1984 administration. By this time, 93 percent of the test-takers were voluntarily responding to the questionnaire. This was the first time that data on the professional preference and choice of field of study were available for, practically speaking, the whole college-going population. And it was the first time that this preference was related to so many other relevant variables. These periodic reports and the annual statistical summaries published by the PRO were invaluable for colleges to plan academic offerings and counseling, for school counselors, the Puerto Rico Department of Education, and other agencies related to economic and social development. Furthermore, the fact that the data was gathered annually made possible historical analysis of changes in the student population.

Communication of research improved substantially from 1975 to 1986. Initially, brief summaries of studies were published in the Office newsletter *Academia*, and then longer, four-page reports, were published as separable inserts and distributed free in the newsletter. But there was need for publishing larger reports that could present all the statistical analyses that supported the research conclusions and that other researchers could examine. In 1986, a series of research studies, named *Hallazgos de la investigación psicométrica* (Findings of Psychometric Investigations), was initiated. The first number in the series was a study of the Mathematics Advanced Level Test, prepared by the Exam Committee (1986), and this was soon followed by a study of two specific groups of PEAU examinees: repeaters and fee-exempted students. (Magriñá, 1987).

In addition to, and simultaneously with, the research activities in support of the admissions testing program that we have summarized, the PRO also carried on much work to improve other aspects of its flagship program. This work was directed to facilitate registration for all the students who wanted to take the tests, to provide more information about the test to prospective test-takers, to strengthen the security in test administration in order to prevent fraud, and to improve the individual and group score reports.

Facilitating test-taking for different types of students. Again, the expansion of opportunities produced increased interest in taking the admissions tests, as these were required by all accredited colleges and several other postsecondary institutions. Every year a number of students were not meeting the established deadline for submitting their application to take the test. There were several reasons for this, including poor counseling, student and parental doubts about the possibility of pursuing college, and vocational indecision. In view of this and the fact that there were only three administrations during the year the PRO made the decision to extend the existing late registration to the very last day before the testing date. A proposal to allow last-minute registration was approved by the council and piloted in June 1980. The student had up to, and including, the Friday before the Saturday test date to register and get a center assigned. The late-late registration, so called to differentiate it with the walk-in registration for the SAT, became operational in October 1981. Applicants were required to call the PRO to find out if and where they could

take it. Ten centers, geographically distributed throughout the island, were used for these late late applicants who were required to pay an additional \$10 fee, present a completed registration form, and bring proper identification documents with a picture.

Another group of test-takers required special accommodations due to different individual conditions. The PRO moved decisively in the early 1980s to organize a fair and efficient system to test these students in accordance with federal government guidelines and College Board standards. In 1982, the Office published and distributed to all schools the booklet: *Procedimientos especiales para atender candidatos impedidos* (later changed to “*candidatos con impedimentos*”) describing the accommodations available, the registration process with the supporting evidence required, and explaining how the test administration would be conducted. Initially, two different printed versions of the PAA were prepared for students with visual limitations: Braille and large type. Later, in 1985, an oral taped version was prepared for the legally blind or almost blind student. This version required no reader so that uniformity was guaranteed. Other accommodations for students with permanent psychomotor impediments were explained as well as for temporal impediments. All the exam proctors would be selected and assigned by the PRO and would follow established guidelines to guarantee security and prevent undue help. All these accommodations would be at no cost for the student. In all cases extra time was allowed. As was then common practice, the test scores would carry an indication that the test was administered under special conditions. It should be noted that this was the first large-scale testing program in Puerto Rico to provide special accommodations and that for several years it remained the only one.

An important part of the Commonwealth’s drive toward universal education was the evening and adult education programs under the direction of the Puerto Rico Department of Education. The students in these programs offered a different profile from the students attending the regular day public schools and had special needs for counseling and information about the admissions tests. In 1983 Jorge Dieppa prepared three orientation sessions for this population that were filmed and transmitted via the Department’s television channel.

The issue of test preparation. As we suggested in a previous section, the issue of preparation for taking the admissions tests was not going to go away. It actually was getting more attention in the late seventies and early eighties. In the United States, the official College Board position was that coaching had little positive effect on the SAT scores as demonstrated by many research studies. The PRO Office had conducted one study on the effect of local test preparation courses for the PEAU tests in 1969 and 1970 with similar results. (Evangeline Alvarez-Silva, *Academia* #16, January 1972.) But schools, colleges and enterprising teachers, and counselors were conducting test preparation courses. These consisted mostly of short-time intensive sessions to review vocabulary and provide mechanical strategies for answering the test items. Whether identified as coaching or review courses, or orientation sessions, the fact was that thousands of students were participating. Chancellor Rafael Cartagena, from Inter American University, San Juan Campus, informed the Advisory Council, that his institution had received over 6,000 applications after announcing a one-day orientation session. Their aim was to make the students familiar with the test and how to approach it, taking away their dread of the exam. Interestingly enough, the council sort of gave its blessing to the orientation sessions, because as Mr. Sims said, even if research shows no score gains from them, “there is an important psychological effect.” (Minutes of Meeting held October 3, 1980.) To this day, almost all institutions run similar but longer review sessions charging a small fee. What’s more, parents continually call the PRO to find out which were the best preparation courses.

This situation prompted the PRO to repeatedly come out disclaiming any endorsement of these courses and, most importantly, to prepare a more substantial guide to the PAA than what it had published since 1964. The original guide explained in simple terms the nature, content and intended use of the PAA; and it provided some samples of typical test items with their correct answers and brief explanations of the same. As the number of examinees increased, the guide was revised adding more information and offering practical strategies on answering the test. Also, some information was included on the achievement tests when these were introduced. But in 1980, a new edition of *Orientación para tomar la Prueba de Aptitud Académica* was published with a major new feature: a complete test was disclosed to allow students to practice and experience a real test. This edition provided more complete analyses of the different item types, discussed how to approach them and explained the correct answers. After working with these examples, the student was advised to answer the whole test abiding by the time limits for each section so as to have as close an experience to the real thing as possible. Once more, the fact that the SAT already had developed such a product, and that the structure of the PAA was similar, facilitated translating most of the SAT guide and making the required adaptations.

The new edition provided the answer key to all the items and gave instructions on how to score it and how to convert the raw score into the scaled score. The guide was distributed free to all students registered for the test, a practice which has continued to our day. Through regular communications in the newsletter, in meetings with counselors, and even in the press, the Office reaffirmed that the College Board did not endorse any coaching or review courses for its tests, or approved any program claiming large increases in the scores. To prepare for the tests, the student should become familiar with the materials and practice test provided in the new guide. Verbally, staff advised counselors to organize orientation sessions to make sure the students went through the guide and completed the practice test but discouraged commercial preparation courses and materials.

But with hindsight, one must say that it was a losing battle because, just like in the United States, all sorts of training courses and books came out. In Puerto Rico, we tried to discourage the colleges' extension/continuing education divisions from offering them, but to no avail. For one thing there was a market and for another they used it as a recruiting hook. The problem is that parents, students, and teachers get anxious and fall prey to the marketing that promises huge increases so your child can get into the college of your choice. On the other hand, I am not sure that you can completely discount what preparation, if well done, can do. That is why even the CEEB later got into the act with preparation materials. In Latin America, the tradition of preparing for tests was unavoidable, and unbeatable, as we discovered later. In Mexico, it also had political implications for the public institutions whose administration (Rectores) was elected with student participation. They were subject to pressures from the students in their own *preparatorias* (high schools) who were not getting into the universities, whereas students from private ones were being admitted because they had higher scores. In Puebla, this gave way to an interesting project in the mid-nineties, where with our advice and consent a different type of preparation experience was designed, and a similar course was completely prepared by the PRO for a special project in Puerto Rico. However, these were not coaching courses but development of reasoning skills.

During the early 1980s, the PEAU student score report was revised two times, in 1981 and in 1984. These revisions were to include additional information taken from students' responses to the descriptive questionnaire. The version that was introduced in 1984 became the definitive score report for many years to come. It included the student identifying data, name, gender, birth date, social security number, and date of previous exams, if any; high school information: name and city, program of study taken, grade point average as reported by student, graduation date, and authorization to send report to school; scores for each of the five tests and percentile equivalent (before the student had to convert the score to percentile); Advanced Level courses taken; plans and preferences: preferred institutions, immediate and future study plans (degree) and field of study; areas where orientation is needed; and interests to participate in activities in college; and authorization to be included in BUSCA. The same information would be sent to the college admissions office. The student was advised to take his copy on his first visit to a college counselor. The PEAU staff conducted workshops for college counselors and admissions officers and for high school counselors to discuss the information now provided and how to use it effectively. Another important addition to the score report was being developed during 1985-86: subscores in the three achievement tests to be reported in 1986-87. Reading and language scores on ESLAT and Spanish, and arithmetic, algebra, and geometry in the mathematics test. These subscores would add value to the Achievement Tests for placement purposes.

There was an unwelcome development that accompanied the PEAU population increase. Several copying and fraud attempts were discovered. The PRO revised the administration guidelines, intensified training of the examiners, and published in the newsletter several articles on how the College Board had installed statistical tools to discover copying and how copying was handled. It even published an article describing the position taken by courts on the U.S. mainland, which supported the measures taken by the testing organizations in fraud and copying cases.

A student search service is developed. Colleges and postsecondary institutions in Puerto Rico, and a few in the United States, had been requesting contact information for the PEAU examinees in order to send them recruitment materials. The private institutions were more interested because they were actively recruiting students and beginning to compete with each other. The University of Puerto Rico received more candidates than it could admit so it was not as interested in the service. The idea of developing a program similar to the Board's stateside Student Search Service® was presented by staff to the Advisory Council in March 1980, and it was discussed in several meetings.

Although there was agreement on the general idea of offering a student search service, there was discussion about making it available to institutions from the States and to postsecondary institutions not licensed by the Council of Higher Education. As we know, a few stateside colleges began actively recruiting in Puerto Rico in the early seventies, a practice that was not fully agreeable to the Puerto Rican institutions that feared a "brain drain." In the 1980s, an

expected decrease in the college-going population in the States and the increasing pressure to recruit minorities, moved more colleges to seek students on the island. High school graduates from the more selective private high schools and the better public ones were good candidates to recruit as they presented a better academic profile than many of the stateside Hispanics. This disturbed the local institutions and the proposal for a search service was considered premature and was tabled until “more information is available on the potential impact of this service on local institutions and the candidate population.” (ACPRO, *Minutes of Meeting of March 7, 1980*, Page 6).

Richard W. Haines, director of admissions at Lafayette College in Pennsylvania, was a member of the Board of Trustees, and their representative on the Advisory Council to the PRO. He participated in the discussion and became aware of the complaints from the local members. With the support of the PRO, a meeting with admissions officers was held at Inter American University in March 1985. Haines argued that the students must be given the opportunity to choose where they want to study and the College Board was committed to facilitating this choice. Puerto Rican institutions should not worry about some students going to the States. Instead, they should start their own recruitment on the mainland and focus on students who were interested in strengthening their Spanish in a Hispanic environment and on Hispanic minority students who were the fastest-growing minority group. He then went on to advise them on how to start an efficient recruitment campaign on the mainland. The first thing was to have competent staff, then an adequate budget, and attractive, well designed, promotional materials. These, of course, were the trademark of the American colleges that were recruiting in Puerto Rico. Haines was undoubtedly a well-intentioned professional and a leader among admissions officers in the States, but he did not know much about the real conditions under which admission offices worked on the island, with very limited staff, small budgets, and modest promotional materials. The other suggestion of creating a reverse flow of students by recruiting Hispanics was interesting, but the real linguistic and educational situation of Hispanics in the States was more complex and not necessarily well known on the island. A summary of his presentation was published in *Academia* (#46, December 1985).

In any event, by 1984 the specific issue was solved, a revised proposal was submitted (Jorge Dieppa, *Memo to Dan Taylor: Draft for PRO Search Project*, March 9, 1984), and the search program was approved to be available early in 1985 **to all College Board member institutions, independent of location**. It was named BUSCA, an acronym for *Búsqueda Universitaria para la Selección de Candidatos a Admisión*. The acronym literally means “search” in Spanish. BUSCA was adapted from the Student Search Service except for the enrollment projections. It would allow the institutions to search for candidates according to one or several specifications, such as score range, educational region, study plans, preferred major, or extracurricular interests. Only names of students who authorized the information to be given to educational institutions were reported. The institution would receive the names, address, and school codes, but not test scores, of the students who met the search criteria in tape form, printed labels, or lists. BUSCA was well received by postsecondary institutions. In its first run, 18 institutions placed search orders, and 16, 014 cases were reported.

PEAU as major source of income. It should not surprise anyone that the large increase in PEAU test volume turned this program into the major income source of the Puerto Rico Office, and in many ways it was the financial supporter of the bulk of the PRO operation. The experience with the other programs was that after the initial development grant from external sources came to an end, they were not completely self-sustaining. PEAU test fees were the primary income, although some marginal income was derived from charges for special services, such as late and late-late registration and additional score reports. With expenses rising year after year, the most practical way to cover them was to increase the PEAU fees. This happened in 1980, from \$15 to \$17, in 1983, to \$20, and in 1985, to \$21. Fees for other programs were also increased but not as often, and their volume did not have a large enough impact.

Developing data processing capacity. The availability of adequate data processing capacity is critical to any organization that conducts testing programs for large populations. When the PRO was established, all the data processing was conducted at ETS facilities in Princeton. This involved considerable costs and limited the Office's growth. As the admissions testing program became firmly established, some of the routine data processing, such as registration and score reports, were conducted at the UPR Mayaguez Campus and by 1973 some of the statistical analyses were run at the Río Piedras Campus. These two campuses had fairly large computer capacity, adequate staff, and reasonable costs. In 1973, Felder Dorn recommended that all work done at ETS be shifted to Puerto Rico in a two-year period, including item analyses albeit with some supervision from ETS. After relinquishing ETS computer services as part of the economy measures in 1975-76, difficulties came up near the end of the decade when staff cuts at both campuses prevented efficient service and meeting the required deadlines. In 1978-79, an electronic reader and a small computer had been installed at the Office for some in-house data processing, but this soon proved to be too small.

By 1980, the PRO began looking for a commercial provider with sufficient computer capacity and adequate staff to conduct all data processing and run all statistical analyses for its testing programs in the San Juan metropolitan area. Negotiations were opened with Caribbean Data System, Inc., a company that had never before done any scientific work but was willing to get the hardware and software needed to run the complex statistics programs for item analysis and equating. Initially CDS processed registration and prepared the test center lists. But later, the ETS programs for item and test analyses, and for equating, were installed in their computer. These made it possible for this external vendor to provide full service, including test registration, scoring and reporting, item and test analyses, and equating. A rented SPSS package increased its capacity to conduct more complex statistical analyses, such as factor analyses, multivariate correlations, and the regression equation data used for validity studies. Proper supervision and security controls were established as PRO staff worked closely with CDS staff and ETS consultants audited the work.

But the ultimate goal of staff and management was to have adequate computer facilities at the Office and conduct all work in-house. CBNYO computer manager Edmond Jacobson gave full support to the PRO to achieve this goal. His practical advice and his advocacy before NYO for equipment and software for the PRO were only surpassed by his good nature and gentlemanliness. For many years, he would visit the Office at least once annually to review the overall needs with the staff, plan acquisitions and often install new equipment. When I assumed the direction of the Office in 1987, he became my adviser, and I am pleased to remember him as a friend.

The slow but steady progress toward computer self-sufficiency was guided by Jacobson beginning in 1978-79, when a small optical reader and a small computer were installed. Later, a WANG VS80 was added, which enabled the Office to process registration for a PEAU administration in-house and provided word processing capacity (1983). In 1985, Fortier and Dieppa reported to the Advisory Council that office space would be redesigned to accommodate a more powerful WANG mainframe VS100 computer that the NYO was “handing down” to the PRO. The “new” computer and the required peripherals were installed in a small and modest “computer center” in 1986. Around this same time individual computers were installed for the Test Development unit to run SPSS and the special programs developed by ETS for item analyses and equating. The PRO had achieved data processing independence. Soon after, there would be no need for external contractors.

But strengthening the PEAU was not enough to support a better transition to college and improve the opportunities for success after admission. The PRO staff, in cooperation with the Department of Education (PRDoE) and leaders in the educational community, decided to implement Whitla’s recommendation to develop a strong guidance program based on a specially designed instrument that would provide information to the student, the school, and parents early in secondary school.

2. Development of a unique Guidance Information Service for secondary schools in Puerto Rico.

Antecedents and beginnings. Soon after the PAA and ESLAT tests were established, Fortier began reporting to New York that he saw an urgent need to develop a guidance program in Puerto Rico. The Planning and Evaluation Commission in 1969-70 confirmed this view and recommended that such a program be given a high priority for the following five years. But as we have seen, the initial impetus was Dean Whitla’s report that emphasized the College Board’s responsibility to aggressively support guidance in the public schools and called for developing a Pre-PAA test for 11th grade and other special instruments for this purpose. Early in 1973 a commission jointly appointed by the Secretary of Education and the Colleged Board, recommended developing a battery of tests and other instruments to support guidance.

By late 1974, development of the Guidance Battery was under way, funded by a grant from the PRDoE who also agreed to become its major user. It was named *Servicio de Información para la Orientación Educativa*, with the acronym SIPOE. In English we refer to it as the Guidance Information Service or GIS. The instruments were developed by the Test Development unit directed by Carlos López, and Dr. Gabriel Cirino Gerena, a guidance psychology expert from the University of Puerto Rico, who provided most of the technical conceptualization and design. A committee of five counselors, three from the Department of Education, one from a private school, and a University of Puerto Rico professor of graduate studies in counseling, played an important advisory role. The committee developed three tests, verbal, mathematical and abstract/mechanical reasoning, and two questionnaires initially described as a biographical and motivational inventory, as well as a short exploration of students’ major interests. Several changes would be introduced later until the Guidance Battery acquired its definitive structure. (See below.)

Pretesting took place in April 1975 in several public and private schools. The final version was normalized in March 1976 with a population of 60,000 eighth-graders. Although developed under a PRDoE grant, the PRO would retain ownership of the instruments, maintain and update them as needed, and offer them to private schools for a \$2.50 fee. The grant covered a first administration without cost for the Department, after which the public school students would be tested under an annual contract at a special fee. The instruments were to be administered by school counselors and teachers to all public school eighth-graders and in the private schools that registered for the program.

The administration of SIPOE in March of every year was planned so that the PRO had sufficient time to score it and have the reports ready for use at the schools at the beginning of the following school year, in August. At this time, the students were initiating their ninth and last grade of the intermediate secondary level. After this year they would move to the three-year high school. Individual and several group reports for the school and the educational system's regional and central administration were an essential part of the new service. The student report included the test scores, his or her responses to the questionnaire, and two separate pages with additional questions and information to allow further exploration of vocational interests and study plans. The report was designed as a working document to help the student understand the test scores, think about the information that he or she offered in the questionnaire, update it if necessary, and get ready to discuss future plans with parents and counselor. The expectation was that the report would facilitate the counseling process, allowing more time for in-depth interviews. The school counselors received a copy of the individual student report sent to each student, a statistical summary of the scores and responses of all the school's tested students, a list of students who expressed an urgent need to meet with the counselor, another list of students who reported they planned to leave school at the end of junior high (ninth grade), and another of students who reported having special talents.

It was important to the future of the new program that counselors and school directors understood the purpose of SIPOE and how to administer it. Workshops were conducted in all the public school system's regions to train them. After it was administered, a second round of workshops was organized to discuss how to interpret scores, the students' responses, and how to use the reports to plan counseling. A special seminar for PRDoE regional guidance supervisors and staff at the Central Administration was held in November 1976. Dieppa, Carlos López, and Dr. Cirino conducted this higher level meeting, which was focused on technical issues for interpreting score results and student responses to the questionnaire and on how SIPOE could be used to improve the Department's guidance and counseling program.

SIPOE becomes firmly established.

The new guidance information service received immediate acceptance from school counselors and directors and the general educational community. Through letters, phone calls, and meetings, the program was lauded as a milestone for counseling and education in Puerto Rico. It should be noted that in addition to the support it provided to facilitate individual counseling, the information collected by SIPOE provided a cross-section profile of students at a critical stage in their lives, in the middle of their junior high school, when most of them are 14 years old. The annual collection of this information, with the added improvements that were soon realized, and the continuous discussion of the reports with counselors, directors, and teachers, were indeed a major contribution not only to guidance but also for many other dimensions of education. The statistical summaries, for example, provided information for school planning and to support proposals for teaching and developmental programs dealing with problems pinpointed by the reports.

Early in 1977, the PRO published preliminary personal data findings from the questionnaire administered in 1976 some of which illustrate the information SIPOE provided. This was the first available information directly provided by students about a whole population of students in any given grade. These are some of the findings: 14 percent of the 50,757 eighth-graders who completed the questionnaire expected to get D or F in science; 13 percent in English, whereas 55 percent expected A or B in Spanish, and 51 percent in mathematics. Five percent reported they planned to leave school by the end of ninth grade; 30 percent did not know what they will do at the end of ninth grade, and 65 percent said they wanted to go on studying. Reading skills needed to improve most, with 17 percent of students saying they needed to improve summarizing what they read; 17 percent needed to read faster; and 14 percent had trouble focusing on what they were reading. Fifty-one percent of the students responded that their father lived at home, and 61 percent said the mother lived at home. As to working preferences, 56 percent preferred jobs that required working with people, and 54 percent said they preferred jobs where they could help others. The most disliked jobs were those related to fine arts, excluding music (17 percent), and those requiring lots of reading, writing, and reporting (15 percent). (*Academia*, #25, January 1977.)

In March of 1977, a total of 55,842 eighth-graders from 388 public and 73 private schools took the SIPOE Battery. All schools received a Technical Manual prepared by the PRO and the consultant. Private school counselors received training for interpretation and use of the results in several workshops around the island early in August when the reports would go out to the schools and students. Meetings were held with private school counselors and principals in the five regions with a larger number of such schools, Arecibo, Ponce, Río Piedras, Santurce, and Bayamón, to explain the SIPOE Battery and how to administer it. Some schools invited PRO staff to give talks on the SIPOE to parents. In August, the reports were sent to the schools on schedule. Meetings were held with counselors to discuss materials prepared for interpretation of the student and group reports. Also, program consultant Cirino and Deputy Director Carlos López visited several schools to talk to students and counselors about their experience with SIPOE. To complete this first evaluation of the program, a questionnaire was sent to all counselors. These activities, paired with the review conducted by the external consultants, and the meetings with the advisory panel, provided good input that soon gave way to several changes to make the program more useful for counselors.

In 1978, a new computer-produced student report was introduced. This brought together onto a large worksheet the report and the questions for further exploration that initially had been printed on separate pages. Also, a Guide for Homeroom Teachers and Counselors was developed and sent to the schools. Many junior high schools did not have counselors, but there was at least one scheduled homeroom session every week. The Guide had lessons and group activities that could be conducted before SIPOE was administered and after the reports were received. This was a very important and useful addition to motivate the school to use the reports and to facilitate counselor and teacher work. As SIPOE continued into its third year, expectations were high when the contract with the Department was renewed, and experimental testing was being planned for Venezuela and Colombia. The new Guide was discussed with counselors from public and private schools in meetings held throughout the island educational regions. By 1978-79, meetings with counselors to discuss administrative and technical aspects of the program became a regular annual activity conducted at no cost to the counselors or the Department. These meetings, together with the role of the program advisory committee, established a lasting bonding between the PRO and the island counselors. In 1986, more ambitious and longer three-day workshops were held at the training center with sleep-in facilities that the Department operated at the former Ramey Air Force Base. Three groups of superintendents, directors, teachers, and social workers were trained to use the SIPOE reports. Over 700 persons were trained in what was a unique effort to get school staff fully involved in using the program.

But beyond the close work with counselors, it was important to reach the school director and the homeroom teachers. Conceptually the goal was to have the three working as a team using the SIPOE reports for improving the academic offerings and guidance. To move towards this goal during the second semester of academic year 1980-81, several meetings were held with groups of school principals, counselors, and teachers, who were invited for the first time, to discuss the best use of the SIPOE reports. To stimulate active discussion, participants first saw two video films where real school principals and counselors presented their experiences using the reports for planning individual and group counseling activities and for planning other strategies to deal with students who were experiencing difficulties.

From 1981 to 1983, important revisions were undertaken by the staff with the advice of the consultant and the SIPOE advisory panel. The student Biographical Data Questionnaire was revised and its name changed to Personal Data Questionnaire. The revisions included adding a table of occupational values and eliminating some questions that were not being used, and redesigning the questions about occupational preferences, integrating the five tables of the questionnaire into one. The questionnaire was printed separately from the three tests so that the school could administer it in a different session. The student report was then revised to accommodate the changes made to the questionnaire and update its content. A first attempt to communicate with parents was made through a brief Bulletin of Information for Parents, designed to stimulate parents to talk with their children about their future and to come to school and talk with the counselors and teachers about their children's scores and responses. Also, a new edition of the teachers and counselors guide, this time named: *Guía para la Interpretación y Uso de Información para la Orientación Educativa*, was published in 1983 (*Academia* #38, April 83), adding a glossary, samples of individual and school reports, forms for tabulating and analyzing school information obtained from the group reports for discussion by the school staff, and directions for organizing group activities to deal with situations meriting the counselor's intervention with several students. These changes became operational in 1982 and 1983, including moving the administration from March to late November in an attempt to have the reports in the school early in the second semester, gaining more time for the counselors to work with the students while they were still in the eighth grade.

After the changes and additions that we have described, SIPOE had reached an essentially stable structure by the year 1984, and was a fully established program serving eighth-graders in the public and private schools. Janning Estrada,

a test development specialist and researcher who became the SIPOE lead and who authored two of the first SIPOE studies, summarized the essential elements of the program in simple and straightforward language (*Academia*, #43, October 1984). The purpose of SIPOE was to help eighth-grade students better plan what they want to study, taking into consideration their abilities, values, interests, and occupational preferences. The assessment battery consisted of four instruments: three reasoning tests and a questionnaire to collect personal data or information reported by the student. The Verbal Reasoning Test measures the student's vocabulary, his ability to reason with words, and his reading comprehension. The Numerical Reasoning Test measures the student's ability to work with numbers and to find solutions to new problems. The Abstract/Mechanical Reasoning Test measures the ability to reason with nonverbal questions based on spatial and other relations of objects. The Personal Data Questionnaire, which for counselors is the central instrument in SIPOE, obtains important information from the students about themselves: their interests, values, skills, study habits, course preference, work environments, and general types of job preferences. This information, adequately presented in the students' report, facilitates the process of making short- and long-term educational and vocational decisions in ninth grade and in high school.

The Department of Education remained by far the major user of SIPOE. The program never achieved the same level of use in the private schools. While all the public schools were tied in through a single contract with the Department, the private schools had to be marketed one by one. The PRO did not have the staff to do this, and it did not have a well-planned strategy to market the program. While the counselors were interested and wanted to use it, they were not the decision makers, and the principals had to be convinced. This required visiting principals personally probably more than once. Also, many private schools felt that the SIPOE questionnaire was more useful for a public school population, which was more complex and problematic than their own. This was perhaps true for a small number of the elite schools but not for most of them. Finally, the fee for private schools was raised from \$2.50 to \$3.00 in 1982-83, and to \$4.00 in June 1985. Whatever the reasons, the fact is that the private school students taking the Guidance Battery never reached more than 45 percent of the eighth-grade population compared to close to 95 percent typical in the public schools. From 1976-77 to 1985-86, the total population examined oscillated between a low of 52,428 in 1982-83 to a high of 63,646 in 1977-78. It should be added that the income provided by SIPOE was not sufficient to offset its cost.

SIPOE as the source for important research. Research required for maintaining the psychometric quality of SIPOE was, of course, a permanent activity at the PRO. But studies based on the information obtained through the SIPOE tests and questionnaire began to come out soon after the program became established. Of the several studies conducted, we single out three because of their pioneering nature and relevance for the educational community. They were published as supplements to the PRO newsletter.

The first of these was a correlation study of the scores on SIPOE with the scores on the PEAU college admissions tests, conducted by Janning Estrada in 1982 but published two years later (*Academia* #42, May 1984). The study showed that there was an added value to the SIPOE scores that had not been fully understood: they provide an indication of the students' future performance on the PEAU if conditions remain unchanged. This "prediction," properly used, should be useful for counseling students to strengthen their weak areas and to plan high school courses that would get them to their goal. The study used a sample of students who took SIPOE in March 1978 and the PEAU in October 1981. A total of 17,896 cases were analyzed, 62 percent women and 38 percent men. The correlations found were all high and positive, considering that there was a four-year lapse between the two tests, indicating a strong relationship between the two instruments. As was to be expected, correlations were higher between the reasoning tests on SIPOE and the aptitude tests on PEAU. SIPOE Verbal Reasoning correlated .77 with PEAU Verbal; SIPOE Numerical Reasoning correlated .66 with PEAU Mathematical Reasoning; SIPOE Verbal correlated .68 with PEAU Spanish Achievement; and SIPOE Numerical Reasoning correlated .64 with PEAU Math Achievement. Multiple regression analyses were conducted to determine the predictive value of the three SIPOE scores and their combination. Combining the three SIPOE scores gave a regression coefficient of .80 for PEAU Verbal Aptitude (Standard error 59) and of .71 for PEAU Mathematical Aptitude (Standard error 68). The single best predictors were SIPOE Verbal for PEAU Verbal (.77 with standard error 63), and SIPOE Numerical for PEAU Mathematical (.66, standard error 78).

The study ends with an explanation of the limits of these "predictions" because of the error always present in these estimations and because of the variables beyond the control of statistical analyses, such as changes that will occur in the student during the intervening four years.

A second study, also conducted by Mrs. Estrada, was an analysis of three variables: average test scores from 1976 to 1981, occupational preference, and immediate plans upon completion of ninth grade. After analyzing these

variables, the author introduced a descriptive profile of the eighth-grade student derived from the total responses to the SIPOE questionnaire (*Academia*, #43, October 1984). The tests averages show that Verbal and Mechanical/Abstract are relatively stable from 1976 to 1981, whereas the Numerical scores have declined more. One surprising finding is the similarity across educational regions for many of the variables. For example, in terms of occupational preferences, students in all regions expressed fundamentally the same preferences and the same strong dislikes. Interestingly, the dislikes were agricultural, manual work, and nonchallenging occupations. This probably reflects the changing values of a society that had moved from agrarian to industrial with modernization since the fifties. As to the immediate plans after grade 9, more than one-third planned to go into the general or academic high school program, another one-third planned to enter a nonacademic program, be it commercial or vocational. However, 27 percent of the students were not too sure what they would do, while 3.6 percent said they would either go to the United States (with their family) or abandon school altogether. The study pointed out that there was a strong similarity across the educational regions, and that no significant changes were seen during the previous four years. Again may we comment that the homogeneity of the response suggests that the traditional rural/urban differences were disappearing with modernization.

The study ended with a brief profile of the eighth-grade student based on all the variables in the questionnaire. The typical eighth-grader had more or less defined plans after grade 9; was aware of the preparation required by job preferences; wanted to get a college degree; saw learning and having good grades as important; was interested in occupations related to music, sports, office work, or people-related; had lived mostly in Puerto Rico, so spoke Spanish always or almost always; did not miss class often, and thought parents' views were important.

These findings illustrate the information collected from the SIPOE questionnaire and reflect the importance for the school system that now had this wealth of information available, reported by school region, and the whole system of public education. The published study even displayed tables and graphs a counselor could easily prepare to better understand information sent to the school and discuss this information with teachers and others on the school staff, as well as with students and parents.

SIPOE consultant Dr. Gabriel Cirino Gerena conducted the third important study of these years. He compared the occupational preferences expressed by individual students on SIPOE and the preferred field of undergraduate study selected four years later on the PEAU student questionnaire in Grade 12 (*Academia* #45, August 1985). This was the second study that compared data from SIPOE with PEAU. Thanks to the annual administration of these instruments, the tests and their questionnaires, and to the controlled quality of the same, research about the characteristics of the students in Puerto Rico was now possible on a continuous basis. Dr. Cirino said it in these words: "Today, ten years after SIPOE started, we are beginning to reap the fruits of scientific research which it made possible." (P. 1).

The sample consisted of 17,896 students who had taken SIPOE in 1978 and PEAU in 1981 and whose records were matched; 38 percent were men and 62 percent were women. This was the same sample used for the study of correlation between test scores reported before. The SIPOE questionnaire asked the student to indicate, of 14 occupational groups presented, which ones the student liked, disliked, or was indifferent to. The PEAU questionnaire asked the student to choose the preferred postsecondary field of study from a list of 12 general fields and within these, more specific majors. The purpose of the study was to see how occupational preferences expressed in the eighth grade relate to the field of study chosen as seniors going on to college or other postsecondary programs. The study found a strong relation between the two. These results showed that (1) interests expressed by students in the eighth grade should be used for supporting their academic plans; (2) the fact that seniors expressing no defined field of study or who marked "other fields of study" had no strong interest definition in eighth grade suggested that counselors should be more proactive in helping these students develop their interests; and (3) the identification of interests as characteristic of certain fields of study and their specialization was useful for the student in his vocational exploration. However, because the study related expressed interest with selected fields of study, not with actual fields being studied by the students, the information should be used for exploration but not for final decisions.

The Guidance Information System developed by the Puerto Rico Office was a pioneering program in the College Board organization. It was the first time that a College Board program was focused on the junior high school student. President George Hanford, in his speech commemorating the twentieth anniversary of the PRO, acknowledged this in the following words:

Only now, and in no small measure due to the experience with the Guidance Battery here, has the College Board come to realize that the college admissions process...the transition from school to college as our Charter puts it... that the process begins not in the eleventh grade with the Preliminary Scholastic Aptitude test but back, as you have long since discovered, at the eighth and ninth grades.” (Hanford, Remarks delivered at Trustee Reception, on December 2, 1982, in Puerto Rico, Page 7.)

In addition to the significance noted by President Hanford, we must point out that SIPOE was the first program developed by the Puerto Rico Office for which there was no College Board model to follow. In that sense, it was a creative response to the needs of the Puerto Rican schools. From this perspective, it was fortunate that Whitla’s specific advice to develop a Pre-PAA was not accepted. This made it possible for the PRO to work closely with the Department to identify more pressing needs in the guidance program. It was the 1972 Joint Commission to Study the Guidance Program that recommended that a battery of instruments be designed for use in the eighth and ninth grades. Both Hanford’s Planning Committee and Whitla’s study had strongly backed Fortier’s initial perception that the PRO had to improve guidance and develop instruments to gather information from the students. SIPOE was the innovative response to that need.

3. Expansion of the Advanced Level program with five new tests in Humanities, Social Sciences, Physical Sciences, Biological Sciences, and Mathematics. (1975–1987)

The expansion is launched under good auspices. As we know, in 1972 Fortier had announced plans to expand the Advanced Level Program, adding five new examinations. By 1974, external funding had been secured from the Association of College and University Presidents and local and mainland foundations and businesses.

The purpose of the expanded and more flexible program was: to make available to the educational community a program that could be used to determine college equivalency and to give noncollege men and women the opportunity to advance in professional positions. The expectation was that local and American corporations and businesses would be interested in a Spanish program of this nature to support personnel development and promotion. Fortier was convinced that a program of tests to grant credit for all the required liberal arts courses that make up the first two years of college and some of the most common business administration courses, could be profitably used. It is evident that Fortier was thinking of combining two programs, AP (in Puerto Rico: Advanced Level) and CLEP, which in the United States were aimed at different populations.

In February 1974, a public announcement was made stating that funding had been completed and development of the five tests would begin soon.³² The hybrid nature of the program was again stated: to offer the opportunity to regular college students and to make it possible for adults in industry and business to get credit for knowledge and experience they have acquired. The talented high school students could also participate through the established methods of the Advanced Level program. Dr. Pedro González Ramos, President of the University of the Sacred Heart, and at the time Chair of the Association of Presidents, declared that “the Association sees this project with enthusiasm because the examinations will provide new opportunities to regular students and interested adults, and this will result in economic benefits for students, as well as economies in time and resources for the students and the institutions themselves.”

The project began immediately and was expected to take three years, that is, until 1977. PRO Director Jorge Dieppa would direct the technical aspects of the project supported by Assistant Directors Carlos López and Santos Meléndez and several well-known faculty members from the colleges and universities who were appointed to the test committees and as item writers. By fiscal year 1974-75, the project was gaining speed; the committees for the five tests were appointed, test specifications were defined, item writers were trained, and pretesting was set for May 1975. In July 1975, it was reported that pretesting of items was completed, and the five tests would be ready for spring 1976. During the second semester of 1975-76, experimental administrations were conducted with samples of students from all College Board member colleges in Puerto Rico to norm the tests and establish the scales. During June and July, several university campuses and regional colleges administered 839 exams to admitted students who had scored high on PEAU and who wanted to advance their studies. Approximately 70 percent of these students scored high enough to get credit. Some of these students had taken courses in high school to prepare themselves, but many had studied independently. Based on this experience, the staff concluded that there was a relatively large pool of students

32. As reported in *Academia*, #20, February 1974, the other donors were: Carnegie Corporation, Banco Crédito y Ahorro Ponceño, Banco de Economías, Banco Popular, San Juan Cement, General Electric Foundation, Angel Ramos Foundation, and IBM.

who could take advantage of the tests. These fell into three categories: talented high school students who prepared themselves through tutoring, independent study, or another nontraditional method; adults interested in returning to or entering college who have acquired knowledge through work and other experience; and transfer students moving from one college to another. If this population were tapped for the extended credit-by-examination program, it would result in substantial savings in time and money for the students and for the institutions. Another expected result was that more spaces would open up for new students in universities as these students move to second-year courses.

The support structure for the new subjects in the program generally followed the same pattern as the original three Advanced Level courses. It included teacher training workshops cosponsored with the Department of Education and a series of publications for teachers and students. A guide for teachers, *Descripción del Curso y Guía para el Maestro*, was prepared. It included a brief description of the course and its general objectives, the course outline and the specific objectives for the major subject areas, recommendations regarding teaching methodology and learning activities, and a bibliography. This guide was sent free to all schools offering the courses. Students could buy a guide, *Descripción General del Programa de Nivel Avanzado*, which included a general description of each course with the topics covered, practice items, and a bibliography of suggested textbooks and other sources for preparing for the exams. Orientation meetings were held often with teachers to discuss the course content and teaching strategies. Intensive three-day workshops, cosponsored with the Department of Education, were conducted in 1981-82 for teachers of the eight courses in the six educational regions of the island.

A successful beginning followed by unsolvable problems. The initial years of the expanded program were promising. From 1975-76 to 1981-82, test volume increased 152 percent, from 3,847 to 9,685 tests taken. But expenses were also increasing, and the program was not achieving self-sustaining status. The program income came from two sources: a contract with the Department of Education which had a top amount (ceiling) independent of how many tests were administered, and the fees paid by individual students from the private schools. The original fee structure had an incentive for students taking several tests, with the first test costing 20 dollars and two to three tests costing 30 dollars. By 1982-83, it became necessary to modify the fee structure and maintain the incentive for additional tests. The new structure was \$20 for one test, \$35 for two, \$40 for three, and \$50 for four or five tests. Finally, as of June 1985, the fees were increased to \$25 for one test, and \$10 for each additional test. These last fees remained in effect until 1991.

But in 1982-83, test volume began to slide, and by 1987-88, only 5,990 tests were administered, a decline of 38 percent compared to 1981-82. The new tests had not achieved the expected volume; for some of them, the volume was so low that valid statistical analyses could not be conducted. Fortier was aware, as early as 1980, that the program was facing strong opposition from one specific University of Puerto Rico campus. By March 1981, the Advisory Council reported to the Trustees that this opposition was the major problem facing the PRO (Board of Trustees, *Information Item*, March 26-27, 1981). Why, we might ask, was one campus's opposition to a program such a major problem? The Río Piedras campus was the oldest, largest, and most selective campus among all the higher education institutions on the island. It was the preferred choice for close to half of the Advanced Level students. Therefore, if that campus denied credit to any one Advanced Level exam, the population taking that exam would be substantially reduced because receiving credit was the major motivation for the students. The exam would soon cease to be cost-effective. Multiply this by four, and it is obvious that the whole program could not be sustainable.

This was a completely new situation for the PRO. The expansion had been supported with a generous grant by the Association of College and University Presidents. The Council of Higher Education had authorized the University of Puerto Rico to contribute a percentage of the total grant. So the expectation was that UPR would back and support the new tests, and indeed the majority of the system campuses, including the second largest and equally selective Mayaguez Campus, supported the program. But the Río Piedras campus did not. Its Academic Senate had not taken action during five years and was, in fact, studying the campus policy towards all the Advanced Level courses and credit-by-examination programs. Fortier explained the situation in terms of leadership. For the first time in PRO history, there was academic and administrative leadership in a particular institution that was not in sympathy with a College Board program, and without the support of the leadership, there was little that could be done to move the Academic Senate. To improve the dismal fiscal situation of the program, a fee increase was approved for 1982-83. But if the new fees negatively affected the volume, then phasing out four tests would be the only alternative. This would be the first time that the PRO had to inactivate a program or a substantial part thereof in Puerto Rico.

There were several reasons behind the Faculty of General Studies' staunch opposition to granting credit for the new exams. The fact was that each Advanced Level course accredited by examination meant one less student taking that course in the Faculty. The possibility of students getting credit for four or five subjects meant that the brighter students could be placed directly in the specialized Faculty of their choice. It would be a gross simplification to say that it was only a matter of self-interest, and of protecting their jobs. Although this could have been a factor for a few individuals, the most important issue was philosophical and educational. The Faculty of General Studies was the essential element of the university reform carried on by Jaime Benitez in the 1940s, inspired by the Spanish philosopher José Ortega y Gasset and the University of Chicago President Robert Hutchins. Its core curriculum included seven prescribed six-credit hour courses in Biological Sciences, Physical Sciences, the Humanities (12 credits), and Social Sciences, as well as Spanish and English. These courses were conceived as interdisciplinary experiences organized around the great ideas and problems of Western civilization as presented in the Great Books authored by the thinkers, writers, and scientists of the Western World. They were supposed to provide the students with the values of humanism and function as a balance to specialization. The methodology combined one or two hours of lectures for large groups given by distinguished faculty, with three weekly one-hour discussion sessions. The Faculty was convinced that this educational experience could not be replicated in a high school in Puerto Rico and that a three-hour standardized examination could not be the basis for granting credit. Other reasons were an increasing questioning of standardized tests and an ideological questioning of the very idea of an external organization having so much influence in the university.

Personally Speaking...

For close to 30 years before coming to the College Board, I was a faculty member in General Studies, teaching the two-year Humanities course (History of Western Civilization), and in the 1960s, I was Associate Dean for Academic Affairs. When this issue heated up in the early eighties, Fortier invited me to evaluate the Humanities examination. One of my most esteemed colleagues had chaired the test committee and I accepted Fortier's invitation. After taking the test, I made a recommendation to my Department of Humanities that three credits could be granted to students scoring 4 or 5 in it. I argued that the exam assessed sufficient historical and conceptual content of the course to warrant granting three credits. My proposition was not accepted, and I lost some friends.

Fortier and Dieppa engaged in numerous dialogues at different levels of authority at the university: the campus Dean of Studies and Chancellor, the Office of the System President, and the Council of Higher Education, which was the institution's Board of Trustees. But ultimately, no authority was willing to take the bull by its horns. These were times when the faculty was reaffirming its authority over academic policy and trying to establish campus autonomy before the central administration. The CHE was more understanding and came out with a nonbinding expression supporting the general concept of granting credit based on examinations throughout the UPR system. But all the other system campuses had approved reasonable policies for granting credit to Advanced Level exams. The only recalcitrant opposition was in Río Piedras, probably because it was the only campus with a Faculty of General Studies. Ultimately the Academic Senate approved a campus policy to grant credit upon passing exams prepared internally by the relevant department. And it reaffirmed granting credit for the original Spanish, English, and Mathematics exams, as well as the new second-level mathematics. Fortier and Dieppa reported their growing frustration with the situation to the Advisory Council and through it to the College Board Trustees. By 1985, the fight for the other four exams had been lost, and the PRO announced its decision to deactivate the Social Sciences and Physical Sciences in 1986-87 and the Biological Sciences and Humanities in 1987-88.

I have previously suggested that this episode was probably Fortier's only defeat in his brilliant and successful career. In retrospect, one may wonder if more careful planning, a better effort to understand the philosophical and academic political issues, and more groundwork with academic leaders in the Faculty **before** launching the expansion could have prevented this unfortunate situation. But this will have to remain in the realm of speculation.

4. PIENSE: An Assessment battery to meet private secondary schools' needs is developed (1984).

PIENSE: Background and origin.

PIENSE was developed in response to requests from several private schools that wanted to have an instrument to evaluate the many students applying for admission to seventh grade. A good number of these came from public schools as the middle class began seeking better educational alternatives for their children. Many came from parochial and other private elementary schools because their parents wanted to give them stronger academic preparation for college. In the late seventies, several of these schools had approached the PRO with the idea, but the Office was too busy developing SIPOE and responded in the negative. At the same time, a number of Catholic schools

wanted the College Board to develop an examination for use in their dioceses. When the PRO told them it could not develop the exam, they decided to use a privately owned local testing service.

In the initial presentation of the PIENSE concept to senior management, (*Memo to Daniel B. Taylor: Proposal for PIENSE*, July 7, 1983), Adolfo Fortier, after acknowledging that the potential universe of users needed more precision, said that there were about 12,000 students moving from grades 6 through 8 in the private schools, including the Catholic ones. Also some special publicly funded schools could become users. The general public schools were not being considered target users, but Fortier said it was not impossible that the PRDoE could use the battery in the future for system assessment on a sample basis. He also believed there was a potential market in Latin America where two schools had expressed initial interest. Finally he had reasons to believe that the Catholic schools were not at all satisfied with the tests they had contracted, implying that they could be amiable to using a College Board test. A tentative launching date was set for February 1984, or if this was not possible, early in 1984. Fortier presented a minimum budget to cover the initial production of one form, including pretesting expenses. Anticipating that there would be no new monies available, he suggested using funds budgeted for developing new forms for two of the troubled Advanced Level new tests. He was convinced that it would be a better investment for the PRO.

Vice President Taylor asked Fred Dietrich, Vice President for Programs, to review Fortier's proposal and make recommendations. Dietrich raised relevant questions and made a few important suggestions (F. Dietrich, *Memo to Dan Taylor: Proposal for PIENSE*, August 1, 1983). He commented that more information was needed to make a sound judgment of the proposal's viability, adding that the market would appear to be relatively small. He raised four critical questions that should be answered: How many secondary schools in PR/LatAm have selective admissions? How consistent is their curriculum so that one standardized battery could be used for placement in most of them? Would this test enhance the presence and prestige of the College Board? Is there available funding "with which to speculate?" The budget seemed to him to be too low by NYO and ETS standards and did not find any specific lines budget for publications for students, interpretative information, statistical analyses for reliability, validity, etc., which were essential to launch a College Board test. Dietrich also raised what in retrospect, was the most critical question: How much were the potential clients willing to pay or charge parents for the test?

We do not know what happened to these suggestions, and we have not found a final proposal with a feasibility and market strategy. But Fortier and Dieppa must have produced a reasonable plan, and the experience with the previous PRO programs was that it could develop good tests at a much lower cost than ETS. Test administration costs would be maintained at a minimum because they would be administered by the schools with their own staff. The College Board was not risking too large an investment, and senior management approved it without further question. One must assume that there were good reasons to have the tests out as soon as possible so as to prevent the new for-profit vendor to make much inroad in the school market.

Purpose and content of the PIENSE Battery. Like SIPOE, the PIENSE Battery had no stateside College Board model to follow; it was an autochthonous creation of the PRO. Jorge Dieppa and Carlos López were the originators of the PIENSE concept with Antonio Magriñá's research support. The Spanish acronym PIENSE stands for *Pruebas de Ingreso y Evaluación al Nivel Secundario*, which means *admission[s] and evaluation tests for the secondary level*. The purpose of the PIENSE battery was to provide reliable information for schools to make admissions and/or placement decisions in order to facilitate transition from the end of the elementary level to the secondary level. It was normed for sixth- and seventh-grade students. But a second purpose was often mentioned: Schools could administer PIENSE to assess learning in the seventh, eighth, and ninth grades.

The two-and-a-half-hour battery consisted of a cognitive ability test and three achievement tests in Spanish, English, and Mathematics. Cognitive ability was defined as the capacity or ability to learn. Thus, the cognitive ability test was often described as measuring learning potential. The multiple-choice items stimulated the student to use logical thinking and the ability to process information through the use of symbols, verbal and quantitative. Achievement levels were measured with multiple-choice items that assessed acquired knowledge and understanding of the subject matter through items that stimulate using knowledge in different contexts. (*Academia* #40, October 1983)

The tests were scored on a scale of 20–80 with 50 as the theoretical average. Whole-subject scores were reported for the four tests but in the achievement tests, partial scores were also reported. The partial scores were arithmetic, pre-algebra, and pre-geometry, in Mathematics; and grammar and reading in both the Spanish and English tests. The three subject achievement scores were averaged to produce a general indicator of the level of academic knowledge achieved by the student. Because the battery could be used with students in several grades and ages, there would

be separate norms. The student score report included percentile ranks for each score by age and grade and was sent to the school for distribution. Each school also received a statistical summary of the total population examined, a general school summary, and a report for each grade. With these reports, a guide for interpreting the scores was also sent: *PIENSE: Guía para la interpretación de los resultados*.

Development and first administrations. The production of PIENSE was put on a very fast track under Test Development Director Carlos López. Items were written in about seven weeks, and pretesting took place in late September and October, 1983. Twenty-eight private schools participated in this pretest conducted to determine the levels of difficulty of items and their discriminating power as well as the correction of their stimuli (premise) and the alternatives. Final test assembly followed immediately after the statistical analyses were completed. The first operational administration took place in the week of February 27 to March 2, 1984. Private schools were invited to participate free of cost for norming the tests; 8,348 students from 87 private schools were tested. During May 1 and 2, workshops on the interpretation of the scores and reports were held, with more than 100 schools attending.

In 1984, everything looked favorable for the PIENSE tests. The PRO informed the educational community that the normalization process had been completed successfully and the PIENSE was ready for use in sixth and seventh grades. A new equated form would be used in 1985, and staff was considering holding two administrations, one in January and the other in March. This to accommodate needs of different schools. A fee of eight dollars was established. Materials for registration were sent to the schools who had participated in the first administration and to others who had shown interest in the interpretation workshops. A pilot testing was arranged in two of ITESM's secondary schools in Monterrey and México City. Expectations were so high that Dieppa announced that a second level of PIENSE was under consideration for use in grades 8 through 11. (*Academia* #41, January 84)

Unfortunately, in 1985, the high expectations were not fulfilled. In the March meeting of the Advisory Council, Dieppa reported that the PIENSE volume for the year was disappointing: only 2,980 students from 38 schools were tested compared to over 8,000 from 87 schools the year before. Of course, there was one big difference: the eight dollar fee. The initial explanation was that schools were saying it was too expensive. If this was the major cause, and we think there were other important causes, then the question raised by Dietrich in 1983 was, evidently, not adequately answered. On the other hand, the schools that did use the tests were reporting that they were fully satisfied and would continue to participate in the program. The volume did not increase at all through fiscal years 1985-86 and 1986-87.

If price were a problem, there were other conditions that would severely limit the prospects of PIENSE achieving a reasonable market. For one thing, this was the first time that a PRO program entered a market where there was already a competing organization with a relatively established product serving many Catholic schools. For another, the PRO had not really conducted market research to determine the viability of their product. A third reason was the fact that staff was too busy in test development and had little time to conduct sales visits to the schools. There was no sales staff as such, and test developers had to do the selling, an activity for which they had no training. The method used was to invite the schools to meetings held in different cities of the island, where test development staff presented the product. Normally the schools were represented by the counselor or a teacher. Follow-up visits to promising schools were then conducted.

The difficulties facing PIENSE were discussed in successive Advisory Council meetings, together with the goal to increase participation of the private schools in SIPOE. In the meeting of April 2, 1986, new council member Louis Christiansen, Headmaster of St. John's School, raised the issue of how the PRO handled relations with the clients and argued that the Office's marketing strategy should be evaluated and strengthened. A discussion followed in which it became evident that there was little hard information on the market and on the services provided by the competition. The discussion came to an end when Dieppa dramatically summed up the problem in these words: "the problem with our marketing strategy is that we do not have one." (ACPRO, Minutes of April 2, 1986, Meeting, Page 5.)

Regardless of the low volume situation, the Test Development staff continued conducting the supporting research for the PIENSE tests. Two such studies were reported in 1986. The first was to study the construct validity of the cognitive ability test, using factor analyses and the principal component method (Author not reported, but probably Magriñá). Six factors were derived from the analysis, and with the exception of the quantitative ability domain, the remaining domains showed a clear structural integrity and each exercise contributed independent information to the total measurement unit. The test has a reliability of .826, and this shows that various facets of the same construct are being measured and the items that define the logical construct define, with small error, a unit of measurement. The

other was a predictive validity study (author not reported), conducted with 89 students admitted to seventh grade in a private school on the basis of their elementary school average and the score in cognitive ability test. As with other tests, the single best predictor was the academic average, but by combining this average with the test score, the validity increased to a high .78, and if the scores in the achievement tests were included, then it increased to .84. In spite of the small sample, this study was good news. Both studies were presented in subsequent meetings with the schools. (*Academia* #48, August 1986)

Before going on to review the Latin American Activities, I find it necessary to state for the record, lest we have lost track of it in the previous pages, that the staff at the Puerto Rico Office carried an extraordinary workload, efficiently and accurately. Just think of it: a staff that began with five people and slowly grew to about 25 by 1986, did all the test development and its supporting research; design and editing of all publications; test registration; organization and supervision of test administration, including delivery to schools and retrieval of test materials; scoring and reporting test scores; workshops for school staff; and promotion and service to clients; and it did this for five programs: PEAU, Advanced Level, SIPOE, PIENSE, and BUSCA, which consisted of 20 different tests and two descriptive questionnaires. It would be hard to find such productivity anywhere.

E. Developments in Latin American Activities from 1969 to 1987: The College Board's presence in the region is expanded through technical assistance and continued increase in PAA use. In 1983-85, this presence is substantially reduced due to strict currency exchange policies and devaluation of national currencies.

As we saw in Part One, the presence of the College Board Puerto Rico Office in Latin America from 1963 to 1969 had several dimensions, including the experimental administrations of the PAA for norming purposes; technical assistance in test development and admissions practices to national organizations of universities, as well as to specific institutions; actual use of the PAA for admissions in a few universities; attempts to use the PAA for applicants from Latin America to American colleges; and, collaboration in efforts being made by Latin American and American organizations to strengthen guidance and financial aid options for Latin American students interested in pursuing higher education in the States.

After the initial foundational period, the PRO activities in the region were concentrated in essentially two areas: One was the continuation of technical assistance and the other was the expanding use of the PAA as the admissions test in a number of private institutions. These two dimensions of the Latin American Activities continued with increasing intensity from 1969 to 1983 but with important changes in their relative importance to the Office. After 1983, both dimensions were negatively affected by fiscal problems in the region, and the PRO presence diminished considerably.

1. Continuation of technical assistance in admissions policies and practices, test development and psychometrics, financial aid, and student exchange.

Technical assistance offered by the PRO to Latin American institutions and national organizations was focused primarily on four areas: admissions policies and practices; test development and psychometrics; and strengthening financial aid programs for studying abroad; and to a lesser extent, collaboration to improve student exchange in the Americas.

Admissions policies and practices. During the seventies, interest in discussing admissions policies and practices began to acquire momentum in Latin America. This interest was stimulated by a broader concern with modernizing higher education as governments and international organizations worried about the most efficient ways to meet the increasing demand faced by the public universities. Difficult economic conditions in many countries would lead to a relative reduction in the public monies available for public higher education as the demand for opportunities to study accelerated. Thus, reforming the selection and admission of students gained certain prominence in the region. This was going to create an opportunity for private higher education as old institutions expanded, some of them creating extension campuses, and new institutions were established. In this situation, it was only natural that the PRO would continue to actively participate as a source of expert knowledge through its Latin American Activities program.

During the first three or four years of the decade, the PRO staff was very active making presentations and sharing their expertise in technical activities in several countries. One such activity was a seminar on admissions practices in Caracas, Venezuela, in June 1971. Fortier and Dieppa made presentations at this seminar, which was attended by almost all the public and private institutions in the country. The activity concluded with a request to the *Consejo Nacional de Universidades* to sponsor development of an experimental national admissions test. It was also suggested that the College Board PRO be asked to provide technical assistance for the project. This meeting was an important step in a process that eventually would culminate in a Venezuelan national admissions test. In October, a similar meeting took place in Lima, Perú, where Fortier participated with a paper on "admissions practices and the equalization of educational opportunities" at the invitation of the Council of Peruvian Universities.

Another important meeting was held the following year in Bogotá, Colombia, with the institutions then using the PAA. Its purpose was to discuss the technical foundations of the test with emphasis on the importance of item analyses, equating of test forms, and understanding the psychometric and statistical concepts behind the PAA. As the seminar developed, it became evident that the participants were more interested in discussing broader and possibly more fundamental issues to deal with the demands for access and the need for selectivity. As reported by Fortier, these issues were the best use of tests scores, how to use the PAA combined with other evaluation instruments, the development of criteria for admissions, the design and organization of admissions procedures, and how to integrate the admissions process with precollege guidance. Reference was made at the meeting to the Harvard seminars on admissions, and the PRO was asked to take the lead in organizing such seminars for Latin America.

The staff at the PRO was able and willing to organize these seminars. But conducting this type of seminar required a substantial investment. By its very nature, it had to be much longer than the typical two-to-three-day conference, and it required adequate room-and-board facilities for two or three weeks and a high-quality staff. In the States, the seminars were financially viable because attendees paid a tuition fee that covered most if not all of the expenses. But for Latin America, tuition had to be kept down as participants would incur expensive travel and lodging, given that dorm facilities were not readily available. This meant that some sort of subsidy had to be provided to participants. In 1973 and 1974, this was not possible due to financial difficulties and the Trustees' decision limiting the use of College Board funds in Latin America. As a matter of fact, during the following two or three years, Latin American technical assistance activities slowed down substantially, although not completely, because the PRO's priority was to solve the financial difficulties and respond to the challenge posed by the Trustees' 1974 Resolution to achieve self-sufficiency.

A few years later when the Office's financial health was restored, Latin American Activities regained their previous level. The PRO sponsored two major meetings in San Juan for institutions that were already using the PAA or interested in learning more about its use in the admissions process. The first one was in September 1977 as part of the Fifteenth Anniversary celebration (*Academia* #27, October 1977). Described as a two-day Roundtable on Latin American Programs and Services, it brought together 15 participants from 5 countries and 8 institutions. Mexico had the largest representation with eight participants: five from the *Universidad Autonoma Metropolitana*, two from *ITESM*, and one from *Universidad de las Americas*. The large group from the *Universidad Autónoma Metropolitana* responded to the fact that this new public institution in Mexico City had requested technical assistance from the PRO to develop its own test. The PRO could not engage in such a project due to limitations in staff, but Fortier invited them to send several participants to the meeting. Two participants came from the *Pontificia Universidad Javeriana* in Colombia; and two from *Fundación Nacional Gran Mariscal Ayacucho*, an educational foundation in Venezuela; Guatemala had two participants, one each from the *Universidad del Valle de Guatemala* and *Universidad Nacional de San Carlos*. The *Universidad Nacional Pedro Henríquez Ureña*, in the Dominican Republic, sent one person. Five of the participating institutions were private, and three were state supported.

The second major meeting was a longer and more ambitious seminar on admissions to higher education very close in concept and duration to what had been discussed in Bogotá in 1973. Fortier was aware that a two-week seminar would be a better way of providing intensive technical assistance simultaneously to many Latin American institutions interested in strengthening their admissions process. This would be more efficient than short meetings in several countries and specific institutions. The Office not only would save in staff time and travel, but the training provided would be more effective. If costs could be kept reasonable by Latin American standards, the seminar would attract sufficient paying participants to limit the PRO's investment.

The first seminar on Theory and Practice of University Admissions was held in San Juan, on June 4–15, 1979. This seminar was organized adapting the Harvard Seminar on Admissions directed by Dean Whitla and cosponsored by the College Board. The seminar was directed to people with leadership roles in developing or managing the admissions policies in specific institutions or at the national level. Sessions were held on admissions policies and practices; developing a working admissions office; establishing a national testing program; use of aptitude and achievement tests, and other psychometric instruments as sources of information and criteria for selecting and admitting new students; preparing informational material and counseling; methods to safeguard test security, and training of examiners and assistants to conduct a standardized test. Different types of sessions were held, including lectures, working in teams, demonstrations, and general discussion. Participants from all institutions present were able to explain briefly their admissions process and the difficulties they faced. At the end, the essential elements of an ideal admissions system were discussed. The presenters from the staff included Fortier, Dieppa, Carlos Lopez, and Ms. Estrada, and three experienced local directors of admissions. The PRO prepared and distributed materials used in the sessions borrowing some from College Board publications and developing others locally.

The seminar was a success. More than 25 applications were received for the 20 available spaces. The selected 20 attendees came from sixteen institutions located in 7 countries: Colombia, Costa Rica, Chile, Honduras, México, Venezuela, and Puerto Rico. Nine of the institutions were private and seven were public. México had the largest contingent: eight participants from five institutions, two of these with more than one campus represented. Surprisingly, three of the Mexican institutions were public, the multicampus *Universidad Autonoma Metropolitana*, the *Instituto Tecnológico de Sonora*, and the *Universidad Autonoma de Aguas Calientes*. It should be noted that the last two institutions would eventually become PAA users in the nineties. The presence of seven public institutions was evidence of the growing concern with admissions practices in the public sector of the region. Chile and Costa Rica were, as we have seen, pioneers in developing national tests, and Colombia and Venezuela would later follow the same

path. The technical assistance meetings and seminars sponsored wholly or in part by the College Board Puerto Rico Office were quite influential in these developments.

Technical assistance activities continued in the early eighties. Group meetings with test user institutions were held in San Juan in 1980 and 1981, with the attendance of representatives of most of the institutions using the PAA. From May 20 through July 1981, the executive director served on a Fulbright assignment as consultant to the Planning Office of the *Universidad de la Republica de Uruguay*. This Planning Office had been assigned the responsibility to develop an admissions testing program and Fortier was asked to help set up the program. He took the opportunity to renew old contacts and explore possible use of the PAA in private institutions in the southern cone of the continent, visiting Buenos Aires, Argentina and Santiago, Chile.

In September 1981, Fortier visited the Venezuelan institutions using the PAA and the Ministry of Education, in October he visited institutions in Bogotá, Colombia, and later attended the NAFSA Region VII meeting in St. Petersburg, Florida; in November, he made a second visit to Colombia to discuss the validity study made for Universidad Javeriana; on December 8-12, he attended a conference of the Latin American Group for the Study and Improvement of Higher Education (GULERPE) in Brasilia, Brazil, where contacts were made to establish the Clearinghouse program in Brazil.

Test development and psychometrics; collaboration with the Universidad del Valle de Guatemala. As we know, during its foundational period the PRO played an important role in supporting a scientific approach to the development of admissions tests in Latin America at a time when psychometric concepts were not generalized currency. The inclusion of three Latin Americans in the first PAA Committee was significant as it gave them the opportunity to strengthen their knowledge about testing, exchange ideas with College Board and ETS staff, and acquire experience. On the other hand, it should be clear that Erika Grassau from Chile, César Jaramillo from Colombia, and Gonzalo Adis Castro from Costa Rica, were not neophytes in test development. The three of them had taken the intensive summer seminars on test development organized by the Educational Testing Service for an international clientele and had been working with tests for several years. In fact, there were other academics from Latin America that had acquired a basic training in test development and psychometrics in the ETS seminars. But the technical assistance provided by the College Board Puerto Rico Office from 1963 to 1969 and from this year, through the mid-eighties was quite different. The development of the PAA by an international committee and the experimental use of the PAA by several Latin American institutions provided a real-life laboratory with an instrument developed in Spanish for Spanish-speaking students. Furthermore, this technical assistance was based on an understanding of the educational realities prevalent in the region, and the fact that all communication was in Spanish made it easier for participants to understand, raise questions, and work together.

Having said this, we must explain that the capacity of the PRO to continue providing technical assistance in test development and psychometrics during the seventies and early eighties was limited by the size of its staff and the fact that their time was committed to the testing programs being developed in Puerto Rico. And we have seen that Fortier thought that it was more important to provide technical assistance on the broad issues of admissions systems as such rather than on the technical aspects of test development. It could well have been that he was worried about committing too much of the staff time in Latin America that could negatively impact the programs in Puerto Rico.

In spite of these limitations, Jorge Dieppa and Carlos López managed to conduct many workshops and make presentations on test construction and related topics. A substantial part of these activities was actually sponsored by the *Universidad del Valle de Guatemala (UVdG)*, with which the PRO established a strong collaboration for most of the decade. This private institution was born out of the *Colegio Americano*, an American international K-12 school in Guatemala City, which received support grants from American foundations, the Agency for International Development and other local and international organisms. In the early 1970s, under the leadership of Vice-Chancellor Dr. Robert McVean, and with a Ford Foundation grant, the *UVdG* became a center to train test developers and measurement specialists for Central America. The PRO, through Dieppa and Lopez, became a major partner in these efforts.

From 1971 to 1977, the *UVdG* organized and held numerous short training courses in test construction in Guatemala, El Salvador, Nicaragua, Costa Rica, and other countries. These workshops were intended to train test makers for all educational levels because national governments and international organisms began calling for assessment of education results. Two special regional seminars were held in 1974 and 1977 at the university in Guatemala for alumni of the initial short courses. The First Regional Seminar to Upgrade Test Construction (June 10–15, 1974) attracted participants from nine countries: Mexico, Guatemala, El Salvador, Honduras, Nicaragua, Panamá,

Colombia, Costa Rica, and the Dominican Republic, and had an international staff of lecturers and workshop leaders. This group included as special guest lecturers the noted Mexican psychologist, Dr. Rogelio Diaz Guerrero (Mexico), Dr. Erica Grassau, whom we met as a member of the first PAA committee, Dr. Samuel Messick, a respected psychometrician from ETS, and Jorge Dieppa from the CBPRO, who lectured on the evaluation of psychomotor skills. Carlos Lopez conducted a two-day workshop on criterion-referenced tests. In February 1977, a Second Seminar with similar purposes and audience took place and both Dieppa and Lopez had important contributions.

Along with these short training courses, the University developed a master's program in measurement, evaluation, and research, offered by the School of Education. Jorge Dieppa and the PRO played a crucial role in this program during its beginnings in 1974. Initially, Dieppa spent two weeks in February as consultant and visiting professor. Later that year, he went back for a four-month period as part of a six-month Sabbatical authorized by the College Board. Dieppa's impact on the development of the master's program was quite large and long-lasting. In the nineties, I visited Guatemala at the invitation of the university, who wanted to rekindle the relationship, and I found several of his former students who remembered Dieppa and the College Board with deep appreciation. I had similar experiences in other countries.

Undoubtedly, the working relationship with the *Universidad del Valle de Guatemala* for close to 10 years was a unique way to extend the influence of the College Board Puerto Rico Office in Central America. Although not formally defined as such, it was a true partnership that allowed the Office to continue providing technical assistance in test development and psychometrics and to be a protagonist in the technical formation of several generations of educators from the region. Since a good part of the travel and living expenses for Dieppa and López were covered by the University's Ford grant, the expense to the PRO was substantially reduced, precisely at the time when its financial situation was weak.

The relationship between the *UVdG* and the PRO cooled down by the end of the decade for reasons not wholly clear. In conversations with Fortier and McVean, I got the impression that there were misunderstandings due to the university's becoming a provider of tests that presented a possible conflict with PRO tests. They had obtained the right to translate and adapt the Differential Aptitude Test and were using this instrument with others developed in-house to provide assessment services to the Ministry of Education, the private schools, and some of the universities. When I visited Guatemala many years later, I found that the DAT was being used for admissions to college and there was considerable discomfort with it, especially at the *Universidad del Valle*. A recently appointed chancellor (*Rector*) wanted to use the PAA, and this visit gave way to a second phase in the relationship of the university and the CBPRO and a new partnership which will be described later.

During the second half of the 1970s, the PRO did continue providing assistance in test development on its own but definitely at a slower pace. As a matter of fact, in 1976 the Office turned down a request for a contract with the Universidad Autónoma Metropolitana in Mexico City to provide substantial support in the development of an institutional admissions test because of staff limitations. Even so, Dieppa was able to visit that institution in May and provide some assistance, and as we already know, they participated with several attendees in the two meetings on admissions policies and practices held in San Juan in 1977 and 1979. This university was to become a large multicampus modern institution challenging in many ways the protagonist role of the *Universidad Nacional Autónoma de México*, the oldest and largest Mexican institution.

As we shall see later, during these years, the number of institutions using the PAA was growing, and they required technical support as they began to define the use of aptitude test scores in their admissions process. Frequently, the decision to use the PAA faced resistance from the professional Faculties who for many years had been using specific knowledge tests prepared by faculty committees and who were quite skeptical about the new aptitude test. In several universities, these tests were retained, and the PAA score had to be combined with the Faculty examination's score. This made it critical to conduct studies to show the predictive value of the PAA for all higher studies, to compare this prediction with the knowledge tests, and to design formulas for integrating scores from the PAA and the knowledge tests for admissions. The PRO staff provided support to the institutions to conduct these studies and to interpret them for the institutional leadership. Providing this support required Dieppa and López, in addition to Fortier, to visit the institutions at least once every two years and in some cases every year. On the other hand, staff from the institutions traveled often to Puerto Rico for the same purpose. In these cases, they also met with admissions staff from Puerto Rican institutions and got to know how the admissions process was conducted. The number of visitors to the PRO and of visits to the user institutions is too numerous to recount here, but it averaged close to 20 per year from 1970 to 1983, when it slowed down considerably for reasons that will be explained later.

Possibly the most important technical assistance provided by the PRO in the early eighties was to the *Universidad de Costa Rica*. As we know, this was one of the original institutions that participated in the development and experimental administrations of the PAA in 1963-65. They developed their own aptitude admissions test at the Institute for Psychological Investigations and had maintained contact with Dieppa and the PRO through the workshops and regional seminars he had offered with the UVdG program.

In 1979, Rosa Blanco Montero, a psychologist who directed the Institute at the time, attended the two-week seminar in San Juan. She returned to Costa Rica convinced that their test needed upgrading, and requested assistance from the PRO. This gave way to frequent written and telephone consultations, and a few visits with Dieppa and other test development staff. In 1983, PRO psychometrician Antonio Magriñá, visited the Institute to conduct workshops in equating and methods for item analysis. This was followed by a two-week visit to the PRO from Statistician María Isabel González, Director of the University's Planning Office and a key member of their admissions testing team. From July 29 to August 9, Mrs. González worked intensely with the PRO test development staff to familiarize herself with the latest methods for item analyses, test reliability, equating, and predictive validity. A few weeks after returning to Costa Rica, she wrote that several important changes were already in process that would strengthen their test. Among the changes she mentioned were broadening the margins of item difficulty, transformation of the raw scores into scale scores, introducing equating of forms, establishing fixed time for the test parts, waiting for all post testing analyses to be completed before reporting the scores, and a revision of the internal structure of the test. (María Isabel González, *Letters to Jorge Dieppa*, August 20 and October 18, 1984.) As we can see, this really amounted to a complete overhaul of the test. The following year the PRO did a technical review of the new test form.

Assistance to develop financial aid and APICE. In October 1973, in an unsigned brief paper on the PRO for an unspecified audience we found this statement with a nutshell description of its work in Latin America:

In addition to assisting universities in Latin America to develop scientific admissions procedures and lending them the use of the PAA until they have developed their own instruments (as in Chile and Venezuela), the Latin American Program has been deeply involved in helping these institutions in the development of scientifically structured financial aid programs. (CEEBS, The Puerto Rico Office of the College Board, October 1973, Page 2.)

Initially, this statement caught our attention because we were not fully aware that the PRO had played an important role in strengthening financial aid programs in Latin America. As we reported in Part One, we knew that Fortier was personally involved in the foundation, in 1968, of APICE, the Pan-American association of student loan organizations but saw this involvement as incidental. Further research soon proved us wrong. During the seventies, the College Board provided substantial technical aid to Latin American institutions and regional organizations dealing with student financial aid. The PRO was able to muster the knowledge and experience of College Board and ETS experts in financial aid in New York and Princeton for this technical assistance.

In December 1971, the Third APICE Congress was held in the Dominican Republic. Fortier was successful in getting Sanford Jameson, from the College Board International Education Office, James Nelson from the College Board's College Scholarship Service, and James Bowman who worked with CSS® at ETS, to come with him as presenters and consultants. Nelson read a requested paper on student financial need analysis. There was general agreement among the representatives from the different national organizations that developing adequate methods to determine financial need in an objective and just way was a top priority for Latin America. Was it a coincidence that the Nelson (1969) and the Kilpatrick (1971) studies in Puerto Rico had arrived at the same conclusion? Probably not, since the literature shows that absence of systematization and objectivity in determining financial aid need was a rather generalized deficiency in many countries and in many jurisdictions in the United States.

Since the founding of APICE, Fortier had been calling for a general survey of the actual practices in determining and granting financial aid in Latin America, much like the way he had surveyed the admissions practices in 1962. Now he proposed that James Bowman, who had been a member of the Kilpatrick Study in Puerto Rico, be asked to visit selected institutions in some of the countries represented in APICE and survey their financial aid practices. Bowman would prepare a paper identifying the common characteristics and major divergences and present it for discussion at a future meeting to be held in Lima, Perú, the following year. Fortier's proposal was accepted, and Bowman visited Panamá, Colombia, and Perú during March 1972. He prepared preliminary financial need analysis models for the three countries visited, and collected basic information on the other APICE countries. His report and the preliminary

models were used as working papers in the Lima workshop on May 8–12 (1972). This was sponsored by the Peruvian Institute of Educational Credit in coordination with APICE. James Bowman, Nelson, and Fortier participated as guests of the Peruvian authorities.

Nelson and Bowman continued collaborating for a few years as consultants with APICE and with individual countries in their efforts to strengthen financial aid need analyses. Fortier kept actively supporting APICE until his retirement in 1987, attending their annual conferences regularly, making presentations in their technical workshops, and as a general adviser on all matters affecting the well-being of the organization. In 1975, for example, he helped organize and accompanied an APICE mission to the Inter-American Development Bank in Washington, D.C., to discuss a possible grant for restructuring APICE's technical secretariat. During this trip, contacts were also made with foundations and international agencies of the U.S. State Department. In October 1984, Fortier helped coordinate, with Sanford Jameson's support, another visit of the APICE leadership to Washington. The purpose of these visits was to seek information about government and private scholarship programs for Latin Americans, to establish relations with organizations such as NAFSA that were interested in student exchange, and to explore the possibilities for joint programs. In addition to a luncheon meeting sponsored by the NAFSA and the College Board's Washington offices, the group visited with State Department and Congressional staff interested in international student exchange, some of the major foundations interested in the same, and some multinational corporations with substantial investments in Latin America.

Fortier's contributions to strengthen financial aid programs in Latin America was recognized by APICE in September 1979. At their Eighth Congress in Porto Alegre, Brazil, in a typically Latin American formal ceremony, he was granted the organization's highest honor: the *Orden Internacional del Crédito Educativo*. To receive this distinction, the recipient must have worked at least 15 years in activities related to financial aid and student loans and must have made a significant intellectual contribution to the field, nationally and internationally. The citation for Fortier read as follows: "To Adolfo Fortier Ortiz: This highest recognition is awarded for your exceptional contribution to the cause of the democratization of education and your constant dedication to the same; the international community exalts your name as an example of a life dedicated to the service of the studious young people." (*Academia* #30, October 1979, Page 1) True to form, Adolfo received this distinction as recognition not only of himself but also of the College Board.

Collaboration to improve student exchange in the Americas. Although it was never specifically stated, technical assistance for the exchange of higher education students within the Americas was one of the original goals stated by Frank Bowles in the early sixties. The College Board conducted two initiatives to foster this exchange in Latin America, and the PRO was a part of both. The experiment to use the PAA as the admissions test for Latin American students applying to American colleges, and the "educational missions" or guidance centers concept, were not successful. Presumably, they failed because the number of students requesting these services was limited and too dispersed throughout the continent, so as to make both initiatives not viable. But the College Board's interest in student exchange continued. The emerging Office of International Education was soon to take the leadership in the College Board's international activities to assist students studying in foreign countries, whether American citizens or foreigners, who wanted to enter higher education in the States. The PRO worked closely with Sanford Jameson in support of this work in the Latin American region. Jameson was an associate in International Education in the New York Office, working under Albert Sims, and when a new office was established for that purpose, he became its first director. Later, the IEO was moved to Washington where it would be closer to the government agencies most pertinent to its activities and to the foreign embassies.

As Bowles had predicted, movement of people across nations with the purpose of pursuing higher education was accelerating, and the difference in educational systems was creating difficulties for the students and the receiving institutions. Understanding the academic credentials of exchange students and determining equivalence with the American credentials became important. This prompted national and international organizations to sponsor conferences, seminars, and international agreements on the subject. NAFSA, ACCRAO, and the U.S. State Department organized several such activities in Latin America. The College Board supported these activities and played an important role in most of them.

The College Board's IEO and PRO provided logistical and technical assistance in the organization of the NAFSA and ACCRAO overseas workshops on academic credentials from Latin America, held in Puerto Rico in 1968 and 1970, and in the broader Seminar on Academic Credentials in Caribbean Educational Systems, which took place in the Dominican Republic in December 1972. Fortier made his knowledge and experience of the region available

to the organizers, and in addition, made key presentations at all of them. The U.S. State Department was also active in promoting student exchange and sponsored workshops for the education and cultural attaches in their Latin American embassies. Mr. Jameson, with Fortier's collaboration, organized these workshops for the State Department held in Lima, Perú, in July 1971 and March 1972. The purpose was to review with the embassy officials the basic issues related to students applying for admission to American colleges. Later Fortier also participated as consultant and presenter at another State Department workshop addressed to a broader audience and focused on counseling and advising of prospective students, held in Río de Janeiro, Brazil, on February 28–March 3, 1977. Several years later, Fortier was the resource person in another of the workshops on higher education in the U.S. held in Mexico City, May 20–26, with representatives from 17 countries in 1984.

But there was another dimension to international student exchange. The increasing movement of students, it should be clear, was not exclusively to the United States. The more developed Latin American countries and Europe were also attracting undergraduate and graduate students, as well as professionals seeking further specialization. And, unfortunately, sometimes this movement was prompted by political changes that forced students, professors, and professionals into exile. The issue of academic credentials was important worldwide, and UNESCO had taken an active role in promoting international agreements to establish a reasonable system to grant equivalence of professional titles, degrees, diplomas, and secondary education credentials. A first conference to draft an agreement for Latin America was held in January 1974, in Costa Rica, and a second one to approve the Regional Protocol on Equivalence of Degrees, Titles, and Diplomas, that took place in July of the same year in Mexico. The United States participated as an observer at both conferences, and Fortier was a member of the delegation.

2. Latin American Activities reconsiders the potential for growth and cautiously moves to a more aggressive approach to promoting the PAA, resulting in slow but steady growth in PAA use.

In discussing PAA use in Latin America, one must take care to avoid comparisons with what happened in Puerto Rico. The conditions were totally different. When the PAA was developed, all Puerto Rican institutions, public and private, had agreed to use it for admissions and to require it from all applicants. And because these institutions were integrated to the American model of higher education, there were no substantial ideological or political conflicts. The test came in at a good moment, when the expansion of higher education opportunities on the island was taking off. Also, in Puerto Rico, the test registration and administration process followed the U.S. practice where the student was the customer, registering and paying the test fees to the College Board, and indicating the institutions to which he wanted his scores reported.

The activities in Latin America were initially focused on providing technical assistance, and the established policy was that the College Board would help interested Latin American countries develop their own national testing services. There were, as we have seen, numerous experimental administrations for norming purposes with small samples of students in most of the Latin American countries. Soon after the experimental administrations were conducted, two or three private institutions expressed their interest in trying out the test with larger groups as part of their admissions process. Thus the PAA was provided to a few selected institutions, which would administer the test for a limited time until local tests were developed, either at the national or institutional level. Fortier was very careful to avoid giving the idea that the College Board's aim was to establish a foothold in Latin America for its tests. There was no intention to market the PAA in any specific country or in the region. And there was no intention for the College Board to deal directly with students. The only exception to this was the experiment to provide the PAA in the SAT testing centers run by ETS for students from the region applying to colleges in the United States. As we know, this idea did not succeed.

Consequently, during the first four or five years, from 1965 to 1968-69, income from the PAA remained insignificant, with a low of \$6,500 and a high of \$11,500, and there was no annual increase pattern. It should be noted that during these early years, for reasons not fully clear, annual income was the indicator most frequently used in the Latin American Activities reports. One possible reason for this practice was that the experimental administrations did not have an established fee per test, and often test booklets were sent to the institution for free ("loaned") or at a nominal fee. The first reference found about a fixed fee was in 1971-72, and annual accurate test volume reporting began in the seventies. This practice, of course, shows the overall "technical assistance" approach that prevailed and the fact that no real attempt to increase volume was contemplated.

Beginning in the 1970s, the established policy was gradually relaxed in order to allow selected institutions to continue using the PAA beyond the experimental administration in their admissions process and to extend this use to other

interested institutions. The fact was that the development of local national admissions tests and programs was not an easy matter. For several institutions, particularly in the private sector, the use of the PAA became more practical, economical and educationally valid. In 1971, Fortier was evidently becoming more aggressive and beginning to think in terms of expanding the PAA use in the region. In May 1972, in a report to the NYO, he discusses the changes that he foresees in the operation. He argues that the admission testing services designed for Puerto Rico can be extended to Latin America, but cautions that this will require some additional resources. This envisioned expansion of PAA use should no longer be tied to technical assistance, and the test should not be provided for free or for a nominal fee. The PRO must charge enough to recover all costs. Institutions that want to use the PAA and receive the related supporting services will have to reimburse all the costs incurred by the PRO. Fortier states that this new approach will be welcomed in Latin America and that, “as a matter of reality, the investment in efforts and resources already made ought to be protected by divulging more [of] the kind of educational services that we are capable of offering. We hope to keep doing precisely that during the coming year.” (*Internal Annual Report: Latin American Activities 1971-72*, Pages 7-8).

This was a great step forward. For the first time, the PRO was considering promoting the PAA and its related services as products that could be provided for a fee, even if only to recover the costs. The idea that the test represented an “investment ... that ought to be protected” was also very important, but it is not quite clear what Fortier had in mind. One wonders if he was worried about protecting the name of the test, *Prueba de Aptitud Académica*. This name was a translation of *Scholastic Aptitude Test* and both the English name and the acronym SAT were protected under copyright and trade-name laws in the United States. But the Spanish name was not protected, only the acronym PAA. Actually, the name became a generic technical name and several countries (Venezuela, Colombia, Costa Rica, Chile) identified their national admissions tests, as *Prueba de Aptitud Académica*. As we know, the CBPRO provided important technical assistance for the development of these tests. The shift in attitude that permeates the cited report was accompanied by the announcement that income from Latin America was increasing slowly but steadily and had reached \$30,000 in 1971. And the future was looking more promising as negotiations were ongoing with four possible new PAA users: one in Mexico, two in Venezuela, and one in the Dominican Republic.

From 1970 to 1976, there was a seven-year period of steady increase in PAA income from the region and now a tendency of annual growth was established. Income went from 20.4 thousand dollars in 1969-70 to \$56,400 in 1975-76. A combination of factors produced this improvement. By 1972-73, the PAA was being used by seven institutions in four countries: *ITESM* in México and *Javeriana* in Colombia, two institutions in Venezuela, and two in the Dominican Republic, and an unidentified student loan association. But most growth in test use was concentrated in the two large private institutions in Mexico and Colombia. These were selective private universities that had used the PAA experimentally and decided to use it regularly. Initially the Colombian *Universidad Javeriana* was by far the major user, at one time accounting for 65 percent of the total PAA use, but in later years it would stop using the PAA. On the other hand, the *Instituto Tecnológico y de Estudios Superiores de Monterrey* continued expanding to other Mexican cities and became the principal user of the PAA in Latin America up to the 1990s.

Due in part to the fact that he had been a consultant in Venezuela before and after he became the director the PRO, Fortier focused his promotional visits on that country, and several large and small institutions joined the PAA program in the following years. Among these, the two salient institutions were Catholic University Andres Bello in Caracas, and the Rafael Urdaneta University in Maracaibo, which joined in 1975-76. During this period, Fortier and Dieppa participated in several academic conferences and received requests for technical aid from Venezuela to develop an admissions testing program for that country. A similar request came from a new public institution in Mexico, *Universidad Autónoma Metropolitana*, from a technological institute in Costa Rica, and from Nicaragua, where the *Universidad Centroamericana* began to use the PAA on a trial basis. The possibility of exporting other PRO programs was also beginning to be explored. Two well-known educators, Dr. Eduardo Plaza, from Venezuela, and Dr. César Jaramillo, from Colombia were contracted as consultants to explore the possible use of *SIPOE*, the Guidance Information Service, in Latin America.

As has been explained previously, during the mid-seventies the new Advisory Council reviewed all of the PRO operations. In October 1976, Council Chairman Bobonis brought up the question of the productivity of the Latin American Activities. He called for a discussion on whether these activities were producing sufficient and effective results to justify their continuation and asked if and how these could be expanded. The council directed Fortier to prepare an assessment of the program so that the council could analyze the situation and decide if Latin American Activities could and “should move at a faster pace than in the past.”

Fortier's assessment was presented a few months later, March 1977, to the PRO Council and also to the International Office Advisory Panel in April (Fortier, *Latin American Activities: An Overview*, March 1977). He described the modus operandi in Latin America as essentially providing the testing materials as well as technical advice on admissions and the use of the tests. The test materials were the same used in Puerto Rico, printed in larger quantities to supply the Latin American institutions. Fortier argued that the operational expenses for these services was minimal because test administration was conducted by the institutions and in some instances the institutions did their own scoring and reporting, as was the case with the two largest users. The only direct investment per se was staff travel to the institutions and the infrequent invitations to Puerto Rico of consultants from Latin America." (Page 2) Of course, in strict accounting terms, this was not wholly correct because printing cost for the extra booklets and testing materials, shipping, and a proportional allotment for test development, scoring and management time, should have been considered as expense. During his tenure, Fortier always argued that income from Latin America was obtained at little cost and justified keeping the test fee low on these grounds.

After addressing the cost-benefit issue, Fortier described the environmental characteristics that defined the possibilities of promoting PAA use in the region. He explained that the Latin America effort was on a university-by-university basis and that a large scale promotional effort may not be appropriate. Instead, promotional activities "will always seem to be limited to a very specific clientele consisting primarily of private institutions." (Page 3) In spite of the fact that progress had been made in increasing interest in a more professional approach to admissions, placement, and testing, many obstacles remained. First, the use of standardized testing had yet to be fully understood; second, it was very difficult to achieve a working consensus among the autonomous institutions to use a common test or develop a national exam; and finally, there was, particularly in the public institutions, a strong reaction against possible American cultural penetration through technical assistance. Even though the private institutions were not completely isolated from these conditions, they were less determined by them and were more apt to use the PAA. Fortier concludes:

that the demand for admissions test materials from Latin America will keep, for the time being, coming from private universities. By definition, this demand will tend to be somewhat inelastic, thus not susceptible to be affected through additional marketing efforts. (Page 4)

It could be argued that this perception that "additional marketing efforts" would not be productive became a self-fulfilling prophecy that limited PAA growth even in the expanding private sector. But perhaps the most important limitation was that the need to strengthen and expand the Puerto Rico programs and to achieve self-sufficiency did not allow enough staff time for work in Latin America. Due to the reality of limited resources and the need to recover all costs in the Puerto Rico operations, Latin American activities remained somewhat marginal and never received the full attention and investment it required. This was particularly true in Fortier's case because the executive director for Latin American Activities also had the responsibility for overseeing the general management of the Puerto Rico Office. This often demanded substantial time and effort, especially for seeking external funding for new projects and building consensus among the different educational constituencies in the Commonwealth.

The most positive achievement of these years in Latin America, and what undoubtedly became the ideal model in Fortier's mind for how the College Board presence in the region should develop in the future, was the use of the PAA at Mexico's *ITESM* and Colombia's *Javeriana*. After these two institutions first used the PAA experimentally for admissions in 1965 and 1966, they had each established, through the assistance provided by the PRO, a systematic admissions process conducted by a well-organized admissions office, that initiated the efficient selection and placement of new students, supported by periodic research. Through the assistance provided by the PRO and the validated use of the PAA, these institutions had developed an admissions model that was indeed a pioneer effort in Latin America.

In 1979, Fortier presented a more complete plan for growth in the region. For this plan to succeed, three conditions had to be met. (Fortier, *The Latin American Activities of the College Board: The Potential for Growth*, April 24, 1979.) First: more professional and technical staff had to be recruited at the PRO to handle work from Latin America. The number of institutions using the PAA in Latin America had increased to 15. Close to 20 American schools and colleges were also administering the test to small numbers of Spanish-speaking applicants. Thanks to these additional customers, income had increased to \$100,000, but the staff members were being overworked. Second, it was necessary to strengthen the in-house computer capacity to accommodate future projected needs for data processing, both in Puerto Rico and in Latin America. And third, funding must be allotted for promotional materials and for conducting new experimental administrations of the PAA and the Guidance Information Service.

With more staff, additional computer capacity, and increased financial resources, the PRO could implement a marketing plan whose main short- and mid-range activities Fortier went on to enumerate. These activities fall into three categories: improving communications with existing and prospective customers, strengthening technical support, and piloting other PRO programs in Latin America. To improve communications, new high-quality informative and promotional materials must be developed, as well as meetings conducted and conferences held in specific countries. Strengthening technical support to users could be accomplished by regularly conducting workshops and conferences on technical issues, translating College Board research publications that would be relevant to institutions in the region, conducting new validity and other studies with the now larger populations tested in Mexico, Venezuela and Colombia, and publishing a technical manual for the PAA with all the information that would be useful for understanding the test, its reliability and validity, and the ways to use it effectively.

The first program to be piloted in the immediate future in as many countries as possible was the Guidance Information Service (*SIPOE*). As a matter of fact, two Latin American consultants were already reviewing the program to evaluate its possibilities and suggest what adaptations were needed. The ESLAT program should also be piloted, as some institutions in Mexico and Venezuela had shown interest in it. Two other developments should be considered at a later date: a Pre-SAT type exam in Spanish, and vocational/career orientation materials. But considering these for Latin American use would have to wait for their development in Puerto Rico. It is not clear what Fortier meant here by a Pre-SAT type test since we know that developing a Pre-PAA test had not been recommended by the Planning and Evaluation Committee in 1969. Fortier also called for expanding the use of the PRO programs with Hispanics in the United States.

It should be observed that these proposals were based on perceptions of interest and on their educational value rather than on a market study, and that no specific estimate of needed resources was presented. But the truth is that conditions were not favorable for a substantial College Board investment in Latin America as was evidenced by the rejection of the Standing Committee on International Education's proposal requesting that the Trustees did not apply the self-sufficiency criteria to Latin American Activities in 1974. Some of the proposed activities were implemented in the following years with whatever resources the PRO could divert, and some success was achieved as PAA use and income from Latin America continued to increase.

As we have previously reported, from 1970 to 1976, the PAA volume in Latin America slowly but steadily increased, achieving \$56.4 in 1975-76. The following year brought a large increase of more than 80 percent, reaching \$103.4, and this was followed by six years of more rapid growth, reaching a peak of \$235.5 thousand in 1982-83. Volume statistics were now reported regularly, and we find that the number of students tested with the PAA went from close to 15,000 in 1975-76 to 39,260 in 1982-83. This latter number represented 40 percent of all tests administered the same year in three programs in Puerto Rico. The impact of this growing test volume on the overall PRO income, although positive, was somewhat limited by the relatively low fee charged in Latin America, which ranged from four to six dollars during the period. As we have seen, these low fees were based in part on the perception that the expense incurred in providing the service was small, because development costs were all charged to the Puerto Rico operation, and the administration costs were incurred by the institution using the test. But there was another reason for keeping the fees low. The institutions charged the students for the application and examination fees in their national currency, but they had to pay the College Board in U.S. dollars. Converting the weaker national currency into the stronger U.S. dollar made the test more expensive for the institution and ultimately for the students and parents.

The PRO was very sensitive to this situation and was always willing to consider ways to reduce the dollar-cost that the Latin American institutions had to pay for using the PAA. One such way was authorizing some of the institutions to score the tests themselves. Another was authorizing them to destroy the used test booklets rather than returning them to Puerto Rico. Both of these arrangements saved substantial shipping expenses that were high because they were required to use U.S. carriers, which were more secure. A third one was to authorize the institution to print the guide to the PAA that had been prepared for Latin American students, and distribute it free as part of the application materials. These special arrangements were made only with the institutions that had been using the PAA for longer periods, such as the *Javeriana* and the *ITESM*, and only after they had been given intensive training and a strict protocol to follow in order to safeguard the security of the tests.

Mexico and Venezuela were the countries where the PAA experienced more growth in the late seventies. In Mexico, the number of ITESM's campuses increased and other universities began using the test; in Venezuela, four institutions had joined the program. The institutional administration format increased the risk of overexposing the test forms in each country because test dates were set by the institutions and/or individual campus. To make things more difficult,

each institution had several test dates and in the case of ITESM, itinerant admissions officers administered the test in many schools in several countries over several months. The PRO was not happy with this situation and tried to get the institutions in these two countries to agree to conduct testing on common dates, and to consider the possibility of establishing interinstitutional agreements for exchanging score reports. If this was implemented, a student could take the test only one time rather than repeating it in another institutional administration, which would increase the risk of being tested twice with the same form.

At least two meetings were held in Mexico and Venezuela to discuss these measures, but progress was slow, particularly in reducing the number of institutional administrations. The private institutions were often competing with other institutions for the same students, and they demanded the flexibility to conduct as many administrations as they thought they needed. The PRO then began alternating test forms in different institutions to reduce the risk of students taking the same test form twice. In promotional visits and training workshops, the PRO staff emphasized that in institutional administrations the integrity of the test was the institution's major responsibility and that the reliability of the test scores was directly related to maintaining the integrity of the test in the administration process. The staff took pains to explain how any breach of the rule—that the student should have no previous knowledge of the content and items of the specific test form he was to take—would negatively impact the admission decisions. It was, therefore, in the institution's interest, to avoid risks to the test integrity. The PRO provided the administration manuals and the training, but in the end, each institution was responsible for test security. In spite of these and other risks, there was not one major security breach.

3. The period of steady growth ends as major institutions in Venezuela and Colombia discontinue use of the PAA.

PAA test use in Latin America peaked at 39,260 in the year 1982-83. These tests were institutionally administered by a total of nine universities. Mexico had four institutions and accounted for 31 percent of the tests administered in the region. Venezuela also had four institutions, but was the largest user country with 42.5 percent of the Latin American total, and Colombia had one institution which administered 26.9 percent of the total. The *Javeriana* in Colombia was the largest single institutional user, administering 26.9 percent of the three countries' total. Mexico's *ITESM* was the second largest user with 23.7 percent. Catholic University Andrés Bello in Venezuela was the third largest user with 22.3 percent. In Mexico, a small but important institution, the *Instituto Tecnológico y de Estudios Superiores de Occidente*, a Jesuit institution in Guadalajara, began using the PAA in 1979.

After seven years of successive increases, PAA test use in the region peaked in 1982-83, and then began to decline rapidly as currency problems forced several institutions to stop using it. By 1986-87, only 16,040 tests were used, a 59 percent loss compared to 1982-83, and income from the region was reduced to \$96,200.

The very same year that PAA use reached its highest level, monetary and currency exchange policies established by the Mexican and Venezuelan governments were beginning to create problems for the institutions using the PAA in those countries. These policies were attempts to deal with a wider international economic crisis that impacted Latin America with much force in the first half of the 1980s. In March 1983, Fortier reported that Mexican and Venezuelan institutions were having difficulties meeting the cost of the PAA in dollars. He described this situation as "the most pressing problem faced this year," and indeed it was, and it would worsen in the next two years because the monetary exchange control imposed by Mexico and Venezuela was making the PAA too expensive in those countries,

Fortier visited Mexico and Venezuela that year to discuss the best possible arrangements for the institutions to pay for the use of the PAA. In México, the peso's devaluation from 25 pesos per dollar to 100 pesos per \$1 created problems for the institutions that had collected the test fee before the devaluation. An agreement was reached so that they could pay the difference for the 1982-83 tests in four installments through May 1985. It was felt that the situation would stabilize and that the students would be able to pay the higher fee in pesos for the following years. This was a reasonable expectation because the Mexican institutions were catering to the better-off students who were able to pay more. As a matter of fact, the test volume in Mexico did not suffer and actually continued increasing during the following years. *ITESM* continued expanding; a few new institutions began using the PAA after 1986-87, and pilots of PIENSE were conducted at a few selective secondary schools. These developments were good because they provided a base for the new marketing effort we would implement in the early 1990s.

But the situation in Venezuela was getting more difficult. The strict control of currency exchange would not soften. A possible solution explored was for the Venezuelan institutions to deposit the cost of the tests they used in bolívares into a College Board account in Caracas, until the College Board, with their help, could obtain a permit to convert the bolívares to dollars at a preferential rate. This solution had been used in Colombia. After further exploration, it became clear that the process was risky, and the two largest institutions, the *Universidad Católica Andrés Bello* and the *Universidad Metropolitana*, did not use the PAA in 1983-84. Only three small institutions remained in the program, the *Universidad Cecilio Acosta*, in Maracaibo, that had joined that year, *Universidad Rafael Urdaneta*, and the *Universidad Tecnológica Sucre*. Their combined test use volume was 2,142 tests.

In Colombia, more or less strict control of currency exchange had been in effect for many years. The College Board had opened a savings account in a national bank, and the *Javeriana* University would deposit their payment for the PAA in Colombian pesos in the College Board's account. Periodically, licenses for buying dollars in reasonable amounts would be obtained from the Central Bank. This process required hiring a lawyer so that it would be completely legal. The system worked, although at some cost to the College Board both in having to pay for the licenses and in the effect on cash flow of the delayed payments. But in 1983-84, the situation deteriorated with a new banking law that affected the College Board account. Also, the issue was raised that as an entity doing business in Colombia the College Board had to register and get a taxpayer number. Savings accounts were taxed at 3.7 percent, and the bank was required to make the deductions every three months. As a matter of fact, US\$ 3,825 had already been so deducted. Fortier registered as the legal representative of the College Board in Colombia with the assistance of attorney Sergio Muñoz, the legal counsel to the university. Although no problems were expected in continuing operating, both Fortier and the university authorities agreed that the day-to-day control of getting dollars was going

to increase and make it more difficult and costly. (A. Fortier, *Memo to A. Kearney re: Bank Account in Bogotá*, October 16, 1984).

But there was another reason for the demise of the PAA in Colombia. A national admissions test had been developed, and the government was pushing it to all the universities. Although not legally required to use it, *Javeriana* had conducted a study to compare the predictive value of the national test and the College Board PAA, concluded that the difference was not significant, and decided to use it. This would relieve the university from political and social pressures as well as from a higher test fee and all the currency exchange difficulties. The irony of this all is that the study was conducted with the PRO's assistance. In 1984-85, one of the two original institutions to use the PAA regularly for admissions, and its largest user for 16 years, stopped using it.

These unfortunate events led to intense soul-searching at the PRO. There was no doubt that the Latin American Activities had been hit really hard, and that the future of the program was endangered. In 1985, Fortier recorded his reflections in two almost identical reports, one to the Advisory Committee on International Education, the other to New York. (Adolfo Fortier-Ortiz, *Latin American Activities, Annual Report 1984-85*, June 1985). He contemplated the inevitability of the governmental controls that would increasingly make it more difficult for the universities to buy dollars on the open market, and the resulting serious income reductions in the Latin American testing program. He said: "The time has come to discuss the future of such programs, country by country, and evaluate what alternatives we have for the immediate future." (Page 2) He wondered if a considerable reduction in the existing six dollar fee was advisable and possible. And he considered the possibility of establishing discounts by volume, by institutions, and by country; and the advisability of accepting local currency until dollars could be bought in the free market.

These questions were left unanswered. Perhaps not dealing with them was a way of responding, as if it was better to let the storm subside and when the calm came, to reconstruct and take off again. The truth is that the large institutions lost in 1983-84 and 1984-85 never resumed using the PAA. And by 1987-88, all Venezuelan institutions were using a national test. But the Mexican institutions kept growing, and a few new institutions in several countries began using the PAA. Thus, after hitting a low of 16,040 tests in 1986-87, PAA volume began increasing slowly but surely. In the next decade, Latin American Activities would acquire new life and vitality.

F. The period of growth and early maturity comes to an end with important new initiatives amid a recurrence of fiscal difficulties. Balance of the 18 years.

As the 1980s reached their midpoint, the fiscal situation of the Puerto Rico Office again became difficult. We have just seen how income from Latin American Activities was substantially reduced after 1983-84. But the Puerto Rico programs were not doing well either. As early as May 1982, the Advisory Council reported to the Trustees that volume growth “seems to be halting.” Three years later, Dieppa reported that total PRO test volume had decreased 5 percent. In 1985, the fight for the four new Advanced Level exams was lost, two of the tests were inactivated in 1986-87, and the remaining two the following year. Test volume decreased from a high of 9,650 in 1981-82 to 6,789 in 1986-87 and 5,990 in 1987-88. The Guidance service SIPOE volume was also decreasing. After its high of 63,646 in 1977-78, it hovered around the low 50,000s for several years, hitting a low of 49,990 in 1986-87. PIENSE had not met its expectations. After the free experimental administration in which 8,348 students from 87 private schools were tested, only 2,980 students from 38 schools took the test for a fee in 1984-85, and this volume went down to 2,213 in 1986-87. BUSCA was the only program growing during those years, but its income was not substantial. As we know, from 1974-75 to 1976-77, the Office had a positive income over expense balance, but in 1977-78, that positive trend was reversed with successive annual deficits until 1988-89.

There were several reasons for this generalized slowdown and decline in test volume. The overall island economy was also slowing down, reflecting what was going on in the American economy, and the annual increases in federal funds for education were decelerating. As a consequence, in 1982 the Department of Education informed the PRO that it was not sure it could continue paying student's fees for Advanced Level and SIPOE beyond 1982-83. Even though it continued to pay for both, the Office had to make certain accommodations in both programs because of limited funds. But the most important reason was that the targeted population for the programs stopped growing. Both the PEAU and the Advanced Level programs were affected by the fact that the number of high school graduates oscillated around 39,000 from 1980-81 to 1986-87. The number of eighth-graders in the public schools went from 52,200 to 46,400 in the same period. This loss was not compensated by the increase of eighth-graders in private schools, which went up from 2,490 in 1980-81 to 3,587 in 1986-87. The only target population that was growing was the sixth- and seventh-graders in private schools, but the PIENSE program faced strong competition from other tests and was not able to tap into this growth from 1984-85 to 1990-91.

But finances notwithstanding, the PRO continued increasing its service to education in Puerto Rico. Two new projects were undertaken before Fortier's retirement. The first one, which began in 1986 and was completed in 1989, was the development of a testing system for the Adult Education Program of the Puerto Rico Department of Public Education (PRDoE). We will describe this project in Part Three because most of it was developed under my watch.

The other initiative was to become one of the most important of the College Board Puerto Rico Office's contributions to education in the Commonwealth and is a tribute to Fortier's commitment to education on the island. But its importance is enhanced because it departed even more than the Guidance Information Service (SIPOE) and the PIENSE tests from the traditional College Board programs. This new PRO venture was development of a teacher certification testing system. How and why the PRO got involved in professional tests is an interesting story that we must recount briefly. In 1984, the legislature had approved a law requiring the PRDoE to integrate an examination to the teacher certification requirements. In December, near the end of his term, Governor Carlos Romero Barceló signed the bill into law. Soon after, on December 28, the Department published the new Teacher Certification Bylaws, including the examination requirement, to take effect in 1987. A new administration was inaugurated in January 1985, and Prof. Awilda Aponte Roque was appointed Secretary of Public Education. During her first public conference announcing her priorities, Secretary Aponte identified the need to upgrade and strengthen evaluation in several of the Department's areas, such as the teacher certification process, promotions of supervising staff, and evaluation of student achievement.

Meanwhile, since early 1985, two prominent university presidents, Dr. Ramón A. Cruz of Inter American University of Puerto Rico and former Secretary of Public Education, and Dr. Pedro González Ramos of the University of the Sacred Heart, had been informally talking with Adolfo Fortier about the possibilities of developing an exam for future teachers in order to prevent candidates with inadequate preparation from being appointed teachers. This reflected their conviction that teacher preparation needed to be strengthened in Puerto Rico. It was generally acknowledged that teacher preparation suffered from the poor academic indicators of entering students, the proliferation and diversity of programs, and a lack of quality controls to guarantee a minimum quality of their graduates.

Presidents Cruz and González, and Fortier, were convinced that a project to prepare and administer a credible teacher exam would develop more efficiently under a broad alliance of different constituencies than if left solely to the Department. In April, Presidents Cruz and Gonzalez informed the Secretary that their two institutions were interested in developing an examination to identify weak areas in the preparation of their own education students, with technical assistance from the College Board's PRO. That same month the Secretary responded, praising the idea, which she said was consonant with the Department's intention to require a licensing test. At her suggestion, a Steering Committee was formed to discuss the idea further and explore bringing together their respective concerns. The committee was chaired by her and included University of Puerto Rico System President Fernando Agrait, with Fortier as adviser. In August, the committee formally asked the College Board to prepare a preliminary concept paper for the project. It was agreed that the examination would be used as one additional requirement for the certification of teachers in Puerto Rico, complementing other existing requirements. Meetings with the leaders of the two major teachers' groups were held to discuss the concept, and they agreed not to oppose it after being reassured that an independent entity would be in charge and that only uncertified teachers would be required to take the examinations.

On September 26, Fortier presented the concept paper prepared by the PRO to the Steering Committee. (Adolfo Fortier Ortiz, *Memo al Comité Piloto...*, 26 de septiembre de 1985). The paper documented the tendency in the United States to increase the requirements for teacher certification and licensing, including the use of examinations to determine minimum competencies. It surveyed the major tests used in the States and explained the prevailing technical requirements for developing professional certification exams. The PRO initially proposed three possible testing areas: communication skills, general knowledge, and pedagogical knowledge and competencies. These areas were tested in all the mainland jurisdictions. Later, other tests could be added to certify competence in the teaching of specific subjects. Each exam was to be developed by an Exam Committee made up of selected specialists from the universities and the test development staff of the PRO.

One of the most salient ideas in the PRO concept paper was its recommendation that the project be funded by the universities, the Department, and local foundations. In conversations with Fortier in 1987, he explained that this was not so much a funding strategy as a way to get the institutions fully behind the tests. The paper assumed that the PRO would develop the tests and administer the program as an independent organization to maintain social credibility. The initial development money would be sufficient to develop the tests and conduct the experimental administrations, after which test fees would allow the PRO to maintain the program, develop new forms, and conduct pertinent research.

After the concept paper was approved in principle by the Steering Committee, early in 1986, the Association of Private Colleges and Universities, the University of Puerto Rico, and the Department of Public Education officially supported the project and committed funds for it. Simultaneously, the Angel Ramos Foundation, the most important in the island, was approached as a possible major funding source. The Foundation's Executive Director, Dr. Francisco Carreras, was a former president of the Catholic University of Puerto Rico and a recognized educator. The president of the Foundation, Mrs. Argentina Hills, was deeply concerned with education on the island. So it was no real surprise that in August 1986, the Foundation approved a grant of \$200,000 for the teacher certification tests. That same month Secretary Aponte called a press conference to announce the beginning of the project. The major island newspapers covered the conference, and several articles were published. Interviews of leading educators and of the presidents of the two teacher groups evidenced a general acceptance of the tests. The role of the College Board as developer and administrator of the system inspired credibility in all concerned.

The full development of the Teacher Certification Tests took place after 1987, so we will look into it in Part Three. Now we have to add that while these conversations about a teacher certification exam were going on, the Secretary had contacted Fortier seeking technical assistance from the CBPRO to review and upgrade, on a fast track, the Department's existing examination for promotion of supervisors, school principals, and district superintendents. The PRO did a thorough revision of the test, strengthening its structure, rewriting many items and writing new ones, and delivered the revised test in June 1985. This was just another notch in a long tradition of PRO services to our public school education system, a tradition that extended from the foundation of the Office throughout its history and into our days.

As we look back on these 18 years from 1969-70 to 1986-87, it is evident that the PRO became one of the important players in education in the Commonwealth of Puerto Rico and that it made substantial contributions to strengthening admissions policies and practices in Latin America. Aside from the financial ups and downs, the educational impact of the programs developed during those years was immense and continues to these days as we

shall see in the next part. If on the one hand, the Office's PAA, Achievement Tests and Advanced Level program followed closely the mainland College Board models in college admissions and placement testing, it also responded with creativity and originality to the Puerto Rican educational environment, developing the Guidance Information Service, the PIENSE tests, and certainly, the Teacher Certification Tests. This was possible because as President George Hanford said in his Twentieth Anniversary speech, the Puerto Rico Office had achieved "a more independent operation in a truly free and associated relationship with the Continental College Board," and because of its first-rate leadership.

In that same speech, Hanford recognized that the PRO had helped the College Board to strengthen its mission and role on the mainland. After describing the contributions made by the Office to Puerto Rico and Latin America, Hanford explained its contributions to the overall College Board mission and operation on the mainland, or as he put it: "the Continent has indeed benefited from the College Board's experience in the Commonwealth." The activities of the PRO helped strengthen the emerging corporate commitment to the civil rights movement and to expansion of access to higher education and provided experience in dealing with other cultural settings. The Guidance Information Service (SIPOE) helped demonstrate that transition to college begins early and that programs have to be designed for grades earlier than that of the PSAT/NMSQT. It also gave the College Board experience and credibility in dealing with minorities such as Hispanics. (George H. Hanford, *Remarks Delivered at Trustee Reception* on December 2, 1982, in Puerto Rico.)

The year 1986-87 also marks the completion of the first 25 years of the PRO. The many important achievements that we have described during its first quarter of a century were possible thanks to diligent and highly competent professionals and dedicated support staff. By any standard, it was a small staff for all the programs and services that the Office provided. This required much commitment to the mission of the College Board and pride in doing good work. But achieving important contributions in difficult times requires extraordinary leadership. The Puerto Rico Office was fortunate to have Adolfo Fortier as its founder and principal leader for 25 years. This leadership was recognized in Latin America as evidenced when APICE gave him its most important distinction. In Puerto Rico, this leadership was recognized when the University of the Sacred Heart conferred upon him a doctorate in education degree honoris causa, on January 31, 1986, for his contributions to higher education in Puerto Rico and the Americas. President Fernando Agrait, of the University of Puerto Rico System, delivered the main speech in a special ceremony.

III. Renewing the mission, transforming the vision: The dynamics of change and continuity in response to new challenges. (1987-88 to 2004-05)

In Part Three, we will describe and explain the major developments at the College Board's Puerto Rico Office from 1987-88 to 2004-05. One development was the Office name change. The Office changed its name two times, first in 1989 when the two positions of Executive Director for Latin American Activities and Director for Puerto Rico were integrated, from the original Puerto Rico Office (PRO), to Puerto Rico Office and Latin American Activities (PROLAA). In 2000 it was changed to Puerto Rico and Latin America Office (PRLAO) to emphasize our increasing presence in the region. Consequently, at the beginning of this section, the office will be referred to as the PRO or the Office as it has been up to this time. As the history of the PRO from 1987 to 2005 unfolds, the name will change to PROLAA and then PRLAO, with an accompanying explanatory note. Writing about this long period was quite a challenge for several reasons. This period began with changes in leadership at both the highest levels of the College Board organization and in the Puerto Rico Office. These years saw many important changes in the PRO's programs and operations. The core programs underwent significant revisions, and several new programs and services were developed in response to emerging educational needs. Latin American Activities were reenergized, achieving substantial growth in PAA and PIENSE use in México and expanding the suite of College Board offerings in the region to include the newly developed CEPA and ELASH™. All in all, it was not just that many changes took place but that the pace of change itself accelerated, reflecting the rapid variations happening in the social and educational external environment.

But perhaps the major challenge faced was the fact that I was writing about developments in which I was deeply involved. Whereas in the previous two parts I played the role of institutional historian, researching and interpreting events of which I had no direct experience, in Part III, I am writing about events in which I was a major actor and that are part of my professional and personal biography. This fact meant that I was very careful to avoid the dangers of selective memory and self-serving interpretations. I took care to go back to all available documents and to request the other actors, my colleagues and collaborators during this period, to give me their descriptions and views of the developments about which I was writing. Even as, undoubtedly, Parts I and II are indeed my interpretation of the events that transpired from the founding of the PRO to the retirement of its founders, Part III will be more so. Although my goal is to be as objective as possible, it will indeed be more of a personal rendering, perhaps a memoir of my 18 years at the helm of the Office.

A. Transition Years: 1987-88 to 1991-92

The Changing of the Guard. During the years from 1987-88 to 1991-92, the PROLAA went through a transition period that began with a change of command and that was characterized by strict control of expenses, new efforts to increase revenues, the beginnings of systematic planning and budgeting, and slow recovery of the Office's fiscal health. Projects initiated in the previous years were completed and became operational, all programs and operations were evaluated, and updating was initiated in some of them. All this activity culminated in the preparation of the first Five-Year Strategic Plan. These years coincided with the installation of a new College Board president; Donald M. Stewart was appointed by the Trustees and began his tenure as of January 1987. His appointment brought a period of critical review of the College Board's mission and operations and a renewed emphasis on planning and new initiatives.

The PRO change of command was artfully orchestrated by Fortier in two movements. Jorge Dieppa, retired in June 1987, and I was appointed Director of the Puerto Rico Office on September 1, 1987. Fortier would remain executive director for Latin American Activities for some time to guide me in understanding the operation. In July 1989, Fortier was granted a six-month terminal sabbatical leave, and I became executive director.

Upon retirement, both Dieppa and Fortier were recognized in special events as was appropriate for persons who had given so much of their lives to the College Board and to education in Puerto Rico. On May 22, 1987, a farewell reception dinner was held to honor Dieppa, attended by staff and key members of the educational community. For Adolfo, we first held a staff lunch in December 1989. But the important event in his honor was an academic

conference sponsored jointly with the Association of University Presidents in October 1990, on Transition from High School to College in Puerto Rico. The conference featured Fortier's keynote speech reviewing the admissions situation in the island, the contributions made by the College Board for the previous 25 years, and identifying some of the new factors affecting transition to college. It was a great celebration of the person and of the organization.

The transition in leadership occurred rather smoothly, although, as I was to find out later, not without provoking some internal discontent. Since my professional training was in philosophy and educational policy, some staff had doubts about my capacity to replace Jorge Dieppa. And soon we had to announce that, for reasons of economy, the two director positions would be integrated into one. As executive director of the Puerto Rico Office and Latin American Activities, I was responsible for four major areas: maintaining and expanding Latin American Activities, representing the organization before all constituencies as the College Board's spokesman and higher local manager, seeking and negotiating external grants and contracts, and managing the Puerto Rico Office operations. Expanding Latin America was going to require much travel and time away from Puerto Rico. Thus I began delegating some decision-making authority to the unit managers so that work could proceed uninterrupted. In August 1989, I was able to bring in a special assistant on a one-year contract, Dr. Rubén Vélez, who had an engineering degree and a Ph.D. in Psychology with experience in the use of computers in academic settings. He was verbally promised a regular position as assistant director the following year, if the fiscal situation improved. Around this time, we unofficially changed the name of the Office, from Puerto Rico Office to Puerto Rico Office and Latin American Activities (PROLAA) to signify our decision to restore our presence in the region. We immediately changed it in all our letterheads and publications.

The 25th anniversary and President Stewart's first visit: On January 28, 1988, the Puerto Rico Office celebrated its 25th anniversary. The new President, Donald M. Stewart, visited us for the first time and hosted a formal dinner to commemorate the occasion. In his speech, Stewart honored Fortier, Dieppa, and the many local leaders who had supported the Office throughout the first quarter of a century. He reasserted that the work conducted at the PROLAA was an important contribution to the College Board's mission and reaffirmed the Board's commitment to it. To punctuate this, President Stewart announced that he would meet the following day with the educational leaders of Puerto Rico to exchange ideas about how the CBPROLAA could serve better the educational needs of the island. The celebration ended with a brief speech by Fortier in which he paid tribute to the willingness of the College Board to support generously the operation in Puerto Rico and thanked the president for his reaffirmation of this commitment. The celebration ended with a special tribute to a group of six college faculty and public school staff for their longtime collaboration with the PROLAA.³³

The meeting between President Stewart and the educational leaders was held on January 29, 1988, at the University of the Sacred Heart, hosted by its President and Chair of the PROLAA Advisory Council, Dr. José Jaime Rivera. The group was very supportive of Stewart's vision and called on the College Board and the PROLAA to expand its traditional role and take a more active role in strengthening K-12 education, focusing more on assessment of learning outcomes, promoting curricular reform, and sponsoring pilot projects to improve teaching. The group added some specific requests for the PROLAA: to expand its role as a forum for communication between schools and higher education institutions; to revisit the financial aid situation; to support and assess educational innovation projects, and to improve the information about students entering college. This was quite an agenda but in the spirit of responsiveness and reciprocity it became part of our work during the following years. (ACPROLAA, *Minutes of Meeting of April 20, 1988*, Page 6.)

Continuation of collaboration with the PRDoE. The traditional working relationship with the Department of Education was of course continued and in some ways strengthened during this period. But there were many difficulties due to the frequent changes in the top hierarchy at the Department. From 1985 to 1992, there were four Secretaries of Education under the same government: Mrs. Awilda Aponte Roque, who stayed for a full four-year period (1985-88), Dr. Rafael Cartagena, who was designated early in 1989 by the re-elected Governor but was not confirmed by the Senate; Dr. José Lema Moya (1989-1991), and Professor Celeste Benitez (1991-1992). These changes brought new people to the high-level positions close to the Secretary, which meant that we had to spend time and effort explaining, and often renegotiating projects already under way or whose proposals had been approved by the previous incumbent. Fortunately, our tradition of service as a nonprofit educational association was well known,

33. Professors Marlene Acarón, Eugene Mohr, Eugene Francis, and test center supervisors: Siro Gutierrez, Luis Cardona, and Nilda Delgado. The first three had been members of test committees and conducted research for over 20 years; the other three were longtime (12 to 20 years) zone supervisors overseeing the logistics of several test centers.

and all the Secretaries and their key staff members had great respect for the College Board and saw the PROLAA as a resource and partner to improve education.

During the transition years, this partnership was evident in four important projects. Two had been initiated back in FY1986-87, before my arrival at the PROLAA, and their origins were described in Part II. But they were completed and became operational under my watch, so they will be revisited here. The two other joint efforts were new initiatives. Looking at these four projects, we can say that they were each different in scope, in the level of participation by the PROLAA, and in the impact they were to have on education, but the four continued the exemplary and unique collaboration between a public agency and a private nonprofit organization, which was present since the founding of the PROLAA. The four projects were a joint study of the Advanced Level program, a contract to develop high school subjects' equivalency tests, the teacher certification examinations, and a contract to develop an external assessment system of academic achievement. But in addition to these major projects, there were many other instances in which the PROLAA staff provided technical advice to the Secretary and the Department's programs. Numerous free training workshops for counselors, teachers, and school principals were conducted annually as part of our regular programs, but there were also frequent requests for staff to be present at meetings in the central administration offices or to form part of working groups, or to provide data from our files with additional analyses needed for proposals and federal or local government reports. Fortier's participation in evaluating the Department's evaluation program is a good example of what we have just said.

In March 1988, Secretary of Education Awilda Aponte appointed a commission of assessment specialists from the five Puerto Rican universities to conduct an urgent evaluation of the Department's Office of Evaluation and make recommendations to upgrade the operation. She had reasons to believe that the Department's evaluation functions were not being adequately fulfilled. Adolfo Fortier was asked to coordinate the Commission's work and be its sixth member. The commission's findings were presented early in August, described as "general and preliminary," because the time and resources available to the commission were not adequate for conducting a thorough study.

The general findings were appalling and confirmed the Secretary's worse doubts. (Comisión Especial para Estudiar la Evaluación del Aprovechamiento Académico en el Departamento de Instrucción Pública de Puerto Rico, *Informe General de la Comisión*, Agosto 1988.) The Office of Evaluation had 24 positions assigned, but for the last several years, 14 had been vacant. Most of the existing 10 staff members were not professionally trained in test construction and psychometrics; they were former teachers and administrators with short in-service training workshops in evaluation. The Office had no data processing capacity having to compete for processing time at the central computer center. Almost all the major tests in use were too old, some of them over 20 years old; they could no longer be considered secure, valid, and reliable, and lacked credibility in the schools, at the central administration and in the external community. The Office's budget, in addition to being inadequate, was too dependent (75%) on federal funds assigned to the Title I program. The commission found that criterion-referenced tests were being mistakenly used as if they were normative tests. The criterion-referenced tests, being essentially diagnostic, provide information about minimum basic competencies achieved by the individual student. Normative tests, on the other hand, are better suited to provide information of the general achievement levels attained by student populations at different stages of the educational process, and this information is comparable from year to year. The publication for public consumption of the data from the criterion-referenced tests as if they were reliable indicators of the general achievement levels attained in our schools was a misuse of that data. In short, it was evident that the Department's Office of Evaluation was not up to what was needed when the government, society, and parents were demanding accountability and higher achievement levels. The fact was that the evaluation function had not been adequately supported for many years, and it showed.

The commission recommended that the Department make substantial investments to support the evaluation function. The Office should be upgraded in the administrative hierarchy so that it reports directly to the Secretary, and it should have adequate data processing capacity on its own. It was imperative to recruit professional test development and psychometric specialists for the vacant positions, to increase salaries to be able to recruit them, and to provide intensive training to the existing staff. Without much elaboration, the commission also suggested that the Department consider "the practical desirability of instituting an external evaluation of academic progress after three, six, nine and twelve years of schooling."

The findings of this special commission are important to understand why the Department of Education sought the services of the College Board Puerto Rico Office for developing two testing systems during these years.

The High School Subjects Equivalency Tests. The first request came even before the commission was formed. The Adult Education Area administered a testing program to grant equivalency for high school subjects to a wide range of students, including working adults attending evening schools, dropouts from the regular high school program, students in institutionalized settings, and even students seeking early graduation. Secretary Aponte was informed by her staff that these tests were not aligned with the current curriculum and that they were not secure because of frequent uncontrolled exposure. She requested that the Adult Education Director find out if the College Board was interested in developing two sets of the 15 tests.

The PROLAA was indeed interested since external contracts for work not incompatible with the Board's mission had been identified as a revenue source that could alleviate the fiscal limitations under which the Office was operating. At this time, only the PROLAA was capable of doing this work locally so it was natural that the Department and, later, the colleges, would seek our services. A contract was signed in 1986, and test development work began immediately.

Unlike the General Education Test that was often used as an equivalent to a high school education, these tests were subject-specific and were expected to measure the same learning objectives achieved in regular classes. The contract called for developing two forms of each of 15 subject tests, as follows: four English and four Spanish tests for grades 9 through 12; three Science tests in general science, biology, and chemistry; and four mathematics tests in general math, algebra, geometry, and intermediate algebra.

The total of 30 tests would be developed in two stages: one set to be delivered in 1987 and the second in 1988. A well-known retired curriculum supervisor and principal, Mrs. María Delgado, was hired to coordinate the project, reporting to Carlos López, Deputy Director for Test Development. Test specifications were aligned with the most recent course guides and were submitted for approval to the appropriate Department staff. Items were prepared and pretested with two large samples, one from Adult Education students and another from the regular high school population. The first set of 15 tests was delivered camera-ready in March 1987 and the second in March of 1988. In each case, the PROLAA conducted the pertinent statistical analyses for norming the tests.

When this project was well advanced, the Department requested five other tests to cover the Social Studies subjects. Again we were to deliver two forms of each test, as follows, General History I and II, History of Puerto Rico, U.S.A. History, Latin American History, and Sociology. The first set was ready for use in September 1988, and the second was delivered in April 1989.

This project was important for many reasons. It was the first time that the PROLAA developed non-College Board tests, actually a complete testing system, for whose administration, scoring, and reporting we would not be responsible. The system included 20 different subject tests, two forms of each; all statistical work that included item analyses, validation, and norming; and administration and scoring manuals as well as a security protocol for the Department to follow. With this project, the PROLAA established itself as the principal local provider of assessment instruments.

The Joint Study of the Advanced Level Program. As we know, the Advanced Level Program was facing many difficulties. Four of the five new tests developed with external funding in the seventies had to be inactivated in the eighties because students were not being granted credit at the University of Puerto Rico Río Piedras Campus where the majority of Advanced Level students applied and were admitted. By 1987-88, the program was reduced to four tests: Spanish, English, Math I and Math II. At about the same time, in 1987, the Department of Education, which paid for the tests taken by the public school students, introduced changes to its longstanding progressive Advanced Level guidelines, which endangered the continuation of the program. The Advanced Level courses would no longer count for the required accumulation of courses for graduation, in lieu of regular senior courses, and the Department would no longer pay for the Math I test. These changes came on top of suggestions from the central administration to school principals to limit the program to the very top students in each subject to increase the percent of students getting a score of 3 or higher. These new guidelines showed that the program's philosophy was not fully understood by the new administration and that the accreditation difficulties at UPR Río Piedras were having a negative impact on the Department. The new guidelines would have placed an undue burden on students and would probably reduce substantially the number of students taking the courses and the examinations.

Upon learning of the changes, Fortier and I requested an urgent meeting with the Secretary and explained to her that the new guidelines would effectively put an end to the Advanced Level Program, which was the only program for bright students offered in the public schools. We were able to negotiate a one-year suspension of the new guidelines

and the joint appointment of a commission to study the program and make recommendations for its continuation with due attention to the Department's questions.

The commission was appointed in December 1987 and was chaired by the Under Secretary of Education, and I acted as its executive secretary. The Department was also represented by an assistant secretary and the director of mathematics. The PROLAA appointed two academic deans from the larger University of Puerto Rico campuses and a private school principal.³⁴

The Commission requested the PROLAA to conduct studies to determine how the students, teachers, school directors, and college staff perceived the program, and how the Advanced Level students were performing in whatever courses they were placed in at college. At the PROLAA, Santos Meléndez and Janning Estrada were assigned to prepare the questionnaires and conduct the research, coordinate with the colleges to provide the grades and analyze them, and provide any other information requested by the commission. Ms. Estrada prepared the research reports.

The findings were overwhelmingly positive and vindicated the existence of the Advanced Level Program. The college students who had participated showed a very high level of approval for the program, crediting it for developing their higher learning skills, which were essential in college. This high level of satisfaction was not limited to the students who had scored high and received college credit; it was also expressed by those who had not. The majority of the students would recommend the program to their friends in high school even if it meant more work. And—this was a surprise—many students felt that the high school teachers they had were as good as or sometimes better than the college teachers.

A large majority (over 70% of the sample) of the surveyed high school teachers and directors confirmed that Advanced Level was the best, if not the only, program for above-average students in their high school, that it enriched their school curriculum, and that more students could benefit from the program. They also called for keeping the Math I course and reactivating the courses that had previously been put on hold. They were also strongly in favor of retaining the traditional practice of substituting the Advanced Level courses in place of regular senior courses to meet graduation requirements. On the negative side, the majority of teachers complained that the Department did not provide enough books and other teaching materials for the Advanced Level courses; many directors wanted better supervision; and most teachers wanted the College Board to provide more professional development activities.

The follow-up studies of student performance in college were conducted with data from the two most selective University of Puerto Rico campuses, and they clearly showed that the Advanced Level students were doing quite well in the college courses in which they were placed. This success was similarly strong in Spanish, English, and Mathematics, subjects in which a second year was required of all students, and it was independent of specific courses. In addition, there was a strong correlation between test scores and college grades. Across all courses, more than 75% of the students who scored 4 or 5 had obtained either an A or a B in whatever non-freshman course they were placed. After these analyses were completed, the Mayaguez campus sent the commission additional evidence from an institutional study comparing performance in second-year courses of students who had taken the freshman course in high school with that of students who had taken the course during their freshman year. The Advanced Level students did better in all courses.

On the other hand, the survey of college staff showed a lower level of satisfaction and much confusion as to the nature of the program. Although more than half said that the Spanish, English, and Mathematics courses and examinations should continue, two-thirds were against bringing back the Humanities, Social Sciences, Biological Sciences, and Physical Sciences, and only one-third felt that a History of Puerto Rico and calculus should be added. It was evident, not surprisingly, that the colleges were very protective of what they considered the more substantial courses of their core curriculum. Most of them felt that these courses, unlike language and math courses, required a distinctive academic tradition and environment that was not available in most high schools. This perception was so strong for many of the faculty that even when the evidence from the follow-up studies was discussed with them they were not moved.

The commission's report was completed in April 1989 (*Comisión para Estudiar el Programa de Nivel Avanzado, Informe Final*, April 1989, 39 pages plus eight appendixes). Its general and specific recommendations to continue and

34. Under Secretary Roque Díaz Tizol, Assistant Secretary Aida Nevárez, and Mathematics Director Lydia Rodríguez, UPRRRP Dean Eduardo Rivera Medina, UPR-RUM Dean Reinaldo Cabán, and Colegio Ponceño Director Father José Basols.

strengthen the Advanced Level program were approved unanimously by the six members. The report unequivocally stated that the program was academically sound, that it was cost efficient, and that it benefited the students, the individual school, the public school system, and the colleges. The commissioners went on to say that it was the best alternative for talented students and that its more challenging curriculum stimulated the better students to develop their abilities to a higher level than in the regular courses. They recommended that the program should be expanded to all schools, extended to a broader spectrum of above-average students, and include more courses; and it called on the Department and the College Board to join in achieving the goal of offering the program in all of the public and private high schools in Puerto Rico. Furthermore, the Department should reestablish the policy to substitute Advanced Level courses for the traditional senior courses, and the public schools should identify talented students early in high school and provide a track leading into the program. In response to the teachers' expressed request, the commission recommended that the College Board, the Department, the private schools and the colleges should combine resources to offer more training for teachers. The Department should assign a full-time coordinator and provide books and teaching materials in sufficient quantities. The College Board and the Department should provide incentives for students and teachers, such as recognizing the most successful ones. Finally, the Commission recommended what was to become the only goal that would not be achieved: that the College Board should explore with colleges reactivating the four courses or some of them, and the viability of developing two new courses: History of Puerto Rico and calculus.

Thanks to the commission's report, the demise of the Advanced Level Program had been avoided and an agenda for its future was defined. On May 12, 1989, the Secretary promulgated new guidelines (Circular Letter 7-88-89), which implemented several of the commission's recommendations and established the goal that in a three-year period, all high schools would be offering at least one Advanced Level course. At the time, fewer than two-thirds of the public high schools were doing it. The PROLAA soon began to implement several of the recommendations that were within our jurisdiction, and we lobbied intensely with the Department to improve the flow of books and materials to the schools. Specific goals were established to extend the program to a number of additional schools each year. An Academic Merit Award was established to recognize students who scored high on three tests and teachers with a high number of students who were high achievers for a number of years. In September, we sponsored a free Opening Gala of the movie *Stand and Deliver* for Advanced Level and regular mathematics teachers from all high schools in Puerto Rico. Out of 1,000 that were invited, half showed up in spite of the fact that Hurricane Gilbert was near. Intensive summer workshops for teachers of the four subjects were held in successive years. In February 1992, the First Annual Advanced Level Teachers Conference was held at the University of Puerto Rico Cayey Campus. The new Secretary of Education, Professor Celeste Benítez, delivered the opening speech and the Chancellor of the Cayey Campus graciously hosted the activity. The conference had professional development workshops and presentations for teachers and directors as well as recognition activities for teachers and students. But the major impact of the Commission's Report would come in 1993 when a unique Special Advanced Level Project was established. This project will be described later.

The Teacher Certification Program becomes operational in 1990. As was said at the conclusion of Part Two, late in 1986 the PROLAA began one of its most important and boldest educational projects: developing and administering a Teacher Certification Testing Program for the Department of Education, known in Spanish as Pruebas de Certificación de Maestros (PCMAS). This project was possible thanks to an alliance of the teacher training institutions, the Department, and the PROLAA. This alliance was conceived by Fortier as a loose structure to secure the needed funding for developing the tests and to share the responsibility of what was indeed a project full of risks. The Angel Ramos Foundation was the most generous donor (\$200K), followed by the Department (\$85K), the Association of Private Colleges and Universities (\$31K) and the University of Puerto Rico (\$5K). The PROLAA would contribute \$90K in staff and other costs. This funding would be sufficient for test development through norming, after which the income from test fees was expected to sustain the program.

The project began in November 1986 when PROLAA staff met with deans and directors of all professional education programs to explore their views about the certification exams and establish lines of communication that would be necessary for a successful project. Some of the institutions were also visited to interview faculty and students. Staff from the PROLAA visited ETS to meet with the staff of the National Teacher Examination Program. The Director of the State of Connecticut teacher tests visited with the staff and provided technical information and "political advice." As part of this first development phase, information about the objectives and curricula of all teacher training programs was collected, analyzed and compared with the Department's requirement for certification. Also, a comparative analysis of the better-known teacher certification tests on the mainland was completed. But probably the most important research at this stage was the Inventory of Teacher's Professional Functions, with a sample of 600

teachers from all over the island. This survey explored their views of what they were actually doing as teachers in the public schools and what knowledge and competencies were necessary to begin teaching.

In another example of the alliance concept, the University of Puerto Rico, Río Piedras Campus, authorized a paid leave of absence to Dr. Andrés Menéndez, Associate Professor of the School of Education, to be the technical director of the project. He was appointed technical director in July 1987 and remained until the tests were operational. Soon after his appointment, five consulting committees, whose members were prominent educators representing the different sectors of the educational community, were working to define the broad components and philosophy of the tests. In this process, PCMAS's initial structure and general content were determined: There would be a Basic Battery of two tests required of all candidates for certification, and specialized tests for teachers of Spanish, English as a Second Language, and mathematics. The Basic Battery's two tests were: General Knowledge and Communication Skills, and Pedagogical Competencies. One important conclusion of these committee meetings was that the tests should stress the processes of understanding, applying, and communicating knowledge rather than the mere recall of factual information.

With this general framework, it was now possible to begin developing the five tests. University specialists in the content areas to be examined were appointed to the Committees of Examiners, one for each test. These committees prepared the preliminary test specifications, which were then validated with samples from active teachers and other education and subject matter specialists. Item writers were recruited, once more from the universities, and trained by staff from the PROLAA and ETS. All proposed items went through the usual review process to select those that met the technical, content, and linguistic standards for pretesting in April 1988. They were pretested on samples of voluntary fourth-year students finishing their bachelor's degree in education in 20 institutions, and on a sample of active teachers in their first year of work. In addition to the multiple-choice items, all candidates taking the Basic Battery had to write an essay in Spanish. Essays were required, also, for the teachers of Spanish and English in their respective test. And a Listening Comprehension section was included in the English exam, prepared under the direction of Dr. Protase Woodford, linguistic specialist from ETS and recorded by him in Princeton.

Test centers were established on six college campuses that had language laboratories with enough seating space to accommodate the expected number of English teacher candidates, and which were located in cities with the largest student populations: San Juan, Ponce, Caguas, Humacao, Arecibo, and Mayaguez. The Basic Battery was first administered on April 29, 1989, to 2,350 candidates. The specialized tests were administered one week later, on May 6, to a total of 596 candidates, 148 in Mathematics, 163 in Spanish, and 285 in English as a Second Language. The multiple-choice tests were scored electronically and then subjected to several psychometric analyses. The essays were scored, using the holistic method, by previously trained professors from all the local universities. A few weeks after the administration, score reports were sent to the candidates, their colleges, and the Department. As has already been said, the Department had decided, with our advice, not to establish any minimum approval score, and to use the scores for ranking the candidates much like the PAA was used for admissions. District superintendents were advised that when the candidates for a teaching position had equal qualifications, those with higher PCMAS scores should be hired.³⁵

It took approximately two and a half years to develop the Teacher Certification tests. The Puerto Rico Office had again made a substantial contribution to the educational history of Puerto Rico. I have often wondered how the Trustees

A group of students from the School of Education at the UPR's Río Piedras Campus staged a protest to request cancellation or postponement of the tests. This campus had a long history of student protests, and we did not want this one to grow out of control. The Under Secretary, Fortier, and I met with the student coordinating committee. They argued that they had not been properly informed and had not had sufficient time for preparation. We showed them all the informative materials that had been distributed, the articles and special announcements published in newspapers, and the Department's communications to the institutions. We argued that all reasonable attempts had been made to inform the students, and we added that no candidate would be negatively affected because the test scores carried no weight for certification and only very limited weight for actual hiring during the first year. Most of the students accepted our position, but a few said that they would go to court to stop the tests. Fortunately, they did not follow through, and the testing occurred with no problems whatsoever.

35. For a complete description of the initial development of PCMAS, see Andrés Menéndez, *Cómo se desarrollaron las Pruebas para la Certificación de Maestros*, (Academia, Vol. 3, #1-2-3, 1990).

approved a program that wouldn't appear to be closely aligned with the College Board's mission, focused as the College Board was on facilitating transition to college. Fortier always said that the Secretary and the other educational leaders wrote to George Hanford, still president of the Board, explaining that only the College Board's Puerto Rico Office had the capacity and the credibility to develop and administer this program to the satisfaction of all the constituencies. We must assume that Hanford discussed it with the Trustees and that they approved the project, but I have not found in the PROLAA's files any document to support this. Anyway, PCMAS remains to this day, after substantial updating conducted from 1999 to 2003, a major player in Puerto Rican education.

In 1992, the Department asked the PROLAA to establish minimum approval scores for the two tests of the Basic Battery. Secretary Celeste Benítez, appointed in 1991, felt that it was necessary to make the certification process more rigorous. We took the position that because the Department was by law the certifying agency, establishing minimum scores was their responsibility, not ours. But we agreed to provide the technical aid for them to do it, and we brought William Angoff from ETS to design and supervise the process using his well-known method of establishing minimum scores for professional examinations. Of course, some of our people were very active with Department staff in the fieldwork, but we maintained the fine line that it was the Department, not the College Board, who decided and established the cut-off scores. The Secretary officially announced the minimum scores and established the rules concerning repetition of any failed exams (*Circular Letter 11-91-92*). If in the future any student who was denied certification for failing the exam wanted to initiate legal action, he would have to file a claim against the Department, not against the College Board, or at least, we would not be the sole or principal target of the legal action. In later years, we extended this position to include the content of the tests and the requirement to write the essay for the Basic Battery in Spanish. In 1993, at the request of the teacher training programs and the department we began reporting subscores to students who failed the tests so they could prepare better in their weak areas before repeating the tests.

There is another side of the PCMAS story that needs to be told. After the initial funding for developing the tests dried up, the program was not self-supporting. The problem was that the number of test-takers was well below what had been estimated. Based on data provided by the teacher training institutions and the Department, the expectation was to have 3,500 candidates taking the Basic Battery, paying a \$25 fee, and 1,000 taking the specialized tests, paying a \$10 fee. These fees were set, taking into account that future teachers came from the lower socioeconomic groups and that their salary would be among the lowest for any bachelor's degree recipient. The real number of candidates tested was 32% less in the Basic Battery and 41% less in the specialized tests. During the first four years, from 1988-89 to 1991-92, the Basic Battery examinees averaged 2,534 and in the specialized tests, they averaged 577. When we conducted a complete fiscal analysis of each PROLAA program for the First Five-Year Strategic Plan in 1991-92, it showed that PCMAS was the program with a larger deficit, so that the College Board had been subsidizing the Teacher Certification Tests by close to \$100,000 annually. For reasons that will be explained later, this situation continued for several more years, although the deficit decreased gradually.

The External Assessment System of Academic Achievement. Another major initiative during the transition period was the development of an external assessment system of academic achievement for the public schools. Two months after the commission on evaluation's report, Secretary Aponte invited us to discuss the possibility of developing reading tests in Spanish under the external evaluation model that the commission had suggested. She wanted the PROLAA to develop the tests, organize and coordinate testing, and report the results to the Department. In that meeting, Fortier argued that if she was going to take the bold step of establishing external evaluation, she might as well include English and Mathematics. Since her primary interest was in testing reading, we assured her that we shared her view of the centrality of reading and made reference to the College Board's Degrees of Reading Power Program developed on the mainland. We would invite its director, Dr. Stephen Ives, for a future meeting. After the 1988 elections, Secretary Aponte was not nominated to a second term. As soon as a new Secretary was nominated, we visited with him to discuss external evaluation, and he showed great interest in the project. But Dr. Rafael Cartagena was not confirmed by the Senate. When the governor nominated Dr. José Lema Moya, we waited until he was confirmed. We met two times with him and his staff. He requested important changes to the original concept and requested a formal proposal, which we submitted. A contract for the first phase of the project was signed early in 1990. A second contract for the administration, scoring and reporting, would be signed later.

In our talks with Secretary Lema Moya he requested that we include science and social studies, and that we gather information about the conditions under which teaching and learning took place in the public schools. We then proposed a much more sophisticated design that shifted the focus from assessing what each individual student was learning to assessing how much learning the education system achieved and the contextual variables that impacted that learning. I had assigned my Special Assistant Rubén Vélez to take the lead in the conceptualization of the new

project, consulting with the Test Development staff and with two external consultants: Stephen Ives (CBNYO) and Albert Beaton (ETS). Dr. Vélez and I visited with Beaton, one of the principal designers of the National Assessment of Educational Progress (NAEP), and retained him as principal consultant to the project.

The SEEAA design called for assessing the attainment of broad and medium range educational objectives established by the Department for all regular program students after completion of grades 3, 6, and 9. We had agreed not to include grade 12 for two reasons: first, PEAU already provided much achievement information in Spanish, English, and Mathematics from at least 75% of high school seniors, and second, as a way of limiting the initial cost of developing the system. The existing curriculum documents were being revised by the Curriculum Division to update objectives and teaching strategies to emphasize the development of competencies and understanding of efficiency in information transmittal. Since the revision was in process, our test committees were asked to consult frequently with the Division's staff and discuss with them other sources, such as the College Board's *Academic Preparation for College*, the national standards for science and mathematics, and pertinent NAEP publications, in order to reach a reasonable consensus for defining the testing specifications. When these specifications were written, they were validated with over 2,000 classroom teachers and supervisory staff to make sure they were realistic and represented what teachers themselves thought should be learned.

Achievement would be assessed in the five basic subject areas of the K-12 curriculum: Spanish, English as a Second Language, Mathematics, Science, and Social Studies. Once the system was operational for a few years, other subjects could be added either permanently or periodically. In describing the subject areas to be tested, an attempt was made to emphasize competencies and integration. Thus at the end of the first three grades, we would assess: Reading and Language Use in Spanish; Mathematics; General Knowledge/Reasoning; and Problem Solving Skills. After six grades: Reading comprehension in Spanish; Language Use in Spanish; Mathematics and Mathematical Reasoning; English Reading and Language Use; Science and Scientific Reasoning; Social Studies and Values. After completion of nine grades, SEEAA would test the same subjects as after six grades but add critical thinking to Social Studies. The proposal also included assessing writing abilities with an essay administered to an island-wide sample of ninth-graders.

The system was designed for assessing group performance, not individual student performance. At the time, the Department was attempting to shift some of the central-level responsibilities to the districts and needed information to compare districts' performance for planning and assignment of resources. SEEAA was developed to support this decentralization to the district level, thus the district was the unit of analysis and reporting, with aggregate analyses and reports for each of the six educational regions, and the education system as a whole. The Department was also considering developing internal tests for grade promotion that could provide complementary information.

In order to reliably test all or most of the important educational objectives, many items were needed, so many in fact, that no single student could respond to all of them in a reasonable testing period of no more than two hours. With Al Beaton's support, a student/subject sampling matrix was designed to distribute all the items in a given subject in several forms that were distributed through a spiraling process throughout the schools in each district. Thus, we had all the objectives in any given subject being tested with significant samples of students in each district, which meant that we could report what was being learned in each subject area in each district. Two other aspects of the reporting system need to be mentioned. One was the use of a common across-grades scale to report the three levels assessed (3, 6, 9) on the same metric. The other was the use of behavioral anchoring that allowed identifying given scores in the scale with a description of the performance level identified with the score. Beaton's intensive work with Vélez, Tony Magriñá, our psychometrician, and José Ruiz Vega, project manager, was essential in these developments.

In addition to assessing the attainment of the educational objectives, SEEAA designed three questionnaires, one for each grade level, to collect information on the school and home environments in order to analyze what influence, if any, they had on learning. Thus, for example, concerning their school, students were asked about the availability of textbooks and other reading materials; of maps and geography materials; of basic measurement and scientific instruments, such as microscopes; and there were questions about teaching itself, exploring, for example, if their teacher conducted demonstrations, discussions, nature outings, and visits to places of historical and cultural importance. Concerning their home environment, some of the questions asked explored how much time they spent doing homework, if they had a designated place for doing it and, if anyone at home helped them study, how much time they watched television, if the family went out to visit places about which they had learned in school. The questionnaires were validated with samples of students to make sure they were adequate to the students' reading level and were understood clearly.

SEEEA was conceived as a continuous, long-range, open-ended system that could be administered annually or every two years, alternating the grade levels tested. After the system became fully operational and was administered annually or every two years, historical analyses would allow reporting changes and trends in the achievement levels and in the contextual variables. This was the most ambitious assessment project attempted by the PROLAA since the development of the PAA. Its design was unique to Puerto Rico with some obvious similarities with NAEP. Two rounds of pretesting had been completed through 1992 when it became a victim of the changes in leadership and the frequent policy shifts in the Department. This time these changes were based on a rather drastic educational reform proposed by a new government, establishing complete decentralization of the educational system and making each individual school an autonomous unit, eliminating any important role of the districts. This reform, together with the Department's sudden need to upgrade the Title 1 Tests, destroyed the program. The Department could not support two testing programs.

B. A Framework for the Future: Restoring Financial Health and the First Five-Year Plan

Initial measures to restore financial health. As we know, the PROLAA enjoyed several years of financial health after the crisis of the early seventies. But during the eighties, a collapse of the PAA use in Venezuela and Colombia, and the difficulties faced by the new programs developed for Puerto Rico, plunged the office again into deficit operation which surpassed \$200,000 in 1985-86 and in 1986-87. The new president was naturally worried and gave us a two-year grace period to become self-sufficient.

Immediate measures were taken to cut the deficit: freezing all vacant positions and reducing all expenses that were not strictly needed for maintaining the programs at the expected level of quality or that were not necessary for increasing revenues. Hospitality expenses were cut in half; budgeted contingency reserves in test development were substantially reduced; the executive director's lunch meetings with important educational leaders and visitors were moved to breakfast; travel expenses to Mexico were reduced by using less expensive hotels and covering more territory on each trip. By the end of Fiscal Year 1987-88, the deficit had been reduced almost in half. The following four fiscal years had their ups and downs, but all of them ended with a positive balance, and a new tradition of annually improving fiscal health was established.

Promotion activities to increase revenues were also undertaken. Having perceived potential for growth in México, we appointed Rodolfo García Garza, a former admissions director at ITESM, as consultant to help us promote the PAA in that country. This effort soon began producing results: from 1987-88 to 1991-92, the PAA volume doubled, from 19,635 to 40,379, and the number of institutions increased from 4 to 11. In Puerto Rico, test volumes also increased as promotional efforts by Santos Meléndez in Advanced Level and Janning Estrada in SIPOE and PIENSE paid off in new and return customers in the private schools. Volume increase was, of course, welcome news, but our incipient financial health was still very fragile. It was not until we prepared the First Five-Year Strategic Plan that the fiscal situation stabilized and improved substantially.

Introducing strategic planning and the First Five-Year Plan. Any complex organization must establish goals to guide its operations, and design and implement actions to achieve those goals efficiently. In this sense, planning was always more or less present in the College Board as a whole, and in its programs and operational units. But after

Personally Speaking...

I was in New York for my first budget discussion in October 1987. A snowstorm had blanketed the city and there I was in tropical clothing and a raincoat. As I walked from the Novotel at 53rd Street to the College Board, I bought rubber shoe covers, a scarf, and a Russian hat from a street vendor. Upon arriving, the guard told me the Office was closed and only the president and the treasurer were in, waiting for some fellow from Puerto Rico. After identifying myself as that fellow, he told me to go up, not before advising that I should get a heavier coat. They were waiting for me, President Stewart, Treasurer Kearney, and a third person whose name I have forgotten. He was a previous Board Officer brought in as a consultant by the president. After explaining the purpose of the meeting, the president asked his consultant to summarize his views on the Puerto Rico current budget (1987-88). He immediately told me that the budget was unacceptable because it violated a Trustees' resolution to the effect that PROLAA had to be self-sufficient, and further, that this anomaly had been going on for at least eight years. When the president asked what I had to say, I was silent for a few seconds, and then I promptly responded: First, I was not aware of the situation because I had not prepared the budget and had not been told to expect any problem; Second, if I had known about the deficit history I probably would not have accepted the job; Third, since the Trustees approved so many deficit budgets, they had, de facto, rescinded on their resolution; and, Fourth, I requested two years to restore financial health. On my flight back to Puerto Rico I reflected on what had happened and promised myself that the Puerto Rico Office would never again face a similar situation.

his designation in January 1987, President Stewart placed a renewed emphasis on more systematic planning as he was charged by the Trustees to make the College Board more relevant to American education, more efficient in responding to its constituencies, and to make sure it was a financially healthy association. He announced his intention to lead a thorough and comprehensive review of all programs and operations. Later, in April 1988, newly appointed Executive Vice-President Kenneth W. Rodgers announced that a new planning and budgetary process would be established aimed at a more efficient use of resources and a better focus on priorities. In May 1989, the new planning and budgeting process was introduced. It consisted of four stages: conducting an environmental scan; writing office and program plans based on the scan; preparation of the budget proposal; and implementation of the plan with frequent reporting and monitoring during a 12-month period. The Trustees had approved broad strategic goals for the organization as a whole: (1) An equity agenda so that minorities' rate of completion of two- and four-year college studies equaled that of nonminorities by the end of the twentieth century; (2) advocating more financial aid based on need; (3) updating core programs so that assessments are free of bias, and tests are properly used; (4) increasing research activities to support new forms of assessment; and, (5) expanding guidance and counseling activities. All College Board offices and programs were directed to develop annual plans that would support these strategic directions and to make the most efficient use of the available resources.

After the October 1987 budget review in the NYO, we had a head start in the efficient use of resources. During 1988-89, a planning group began examining our external environment, taking a closer look at each of our programs, and implementing some changes to strengthen them. However, we soon discovered several major critical problem areas and decided to engage in a more thorough and long-range planning effort: a Five-Year Strategic Plan, wholly based on our circumstances and potential but guided by the College Board mission and directives.

Before undertaking this major effort, it was important to take a close look at the staff, its capacity, and potential. After the hiring freeze in 1987, we were able to hire five or six additional full-time staff members for the Teacher Certification project and the external contracts with the PRDoE. However, the 30 professional and support staff members we had in 1990 were still not enough for all the work the core programs and the contracts required. I had met with the staff to review their responsibilities, their academic preparation and training, and their professional goals. Most of the staff appreciated working for the College Board and were willing to go the distance to strengthen the PROLAA. But there was some tension, particularly among Test Development professionals who felt that they were not given adequate autonomy to perform their responsibilities. I invited Jorge Dieppa to come in as a consultant and take a look at the situation, which had already produced a few incidents and some delays in meeting deadlines. Dieppa observed that the test development professionals were able and willing to assume more responsibility with a minimum of supervision. He recommended creating clusters of related programs under assistant directors and giving these directors enough independence to be creative, develop their own initiatives, and be responsible for their cluster with a minimum of external control. He confirmed that opportunities for professional development would be welcome by all, and that it was necessary to have additional professional and support staff. These suggestions were incorporated into the plan, to be implemented gradually as resources became available.

Preparing the Five-Year Plan was a collective undertaking which took two years to complete. No external consultants were hired, but Vice President Rodgers was a constant source of technical advice and moral support. Rubén Vélez did most of the research and financial analyses; while other staff provided information, critical comments, and suggestions. Existing and predictable educational needs were identified, and our response to these needs was evaluated. Past achievements, limitations, and opportunities were documented and analyzed. A complete fiscal profile was prepared for each program, using accounting and financial analysis methods new to the Office. The completed plan was discussed in two general staff meetings early in 1992; it was presented to the Advisory Council in May of that year, and to the New York Office for final approval soon after. It became fully operational in FY1992-93, but implementation of some of its strategies really began earlier and tied up with some of the initiatives taken during the transition years. The Plan was evaluated and updated every year as the PROLAA submitted the annual plan for NYO.³⁶

The environmental scan yielded important information, some of it positive, but there were some frightening signs that required thinking ahead and moving with caution. Our organization continued to command great respect in the education community, but it was often perceived as a prosperous enterprise that could and should provide more services to schools and colleges. Growth in higher education was slowing down after reaching 160,000 students

36. For the complete plan see: PROLAA/LAA, Five-Year Strategic Plan: 1992-93 to 1996-97, April-May, 1992. 71 pages.

in 58 accredited campuses in 1991, and was expected to stabilize in the near future. Colleges were not happy with the preparation of incoming students and were facing a difficult retention problem. Employers were critical of the education received by college graduates; and government and society were calling for accountability, improving quality of education, and increasing retention. The College Board's PROLAA was expected to play a role in improving this situation, and member colleges looked up to us for help and support.

The Department of Education had always been an important variable in our external environment. During these years it underwent several changes in management and in its policies and practices. The two major characteristics of the public school system were, first, its centralization, which made school districts completely subordinated entities, and, second, its complete lack of autonomy from the political structure that controlled the appointments of its senior executives, practiced political patronage, and too often attempted to micromanage the system. In 1990, a new Education Law was a feeble attempt to establish a buffer zone between the Department and the political structure creating a General Council of Education as a policy-making body, responsible for evaluating educational outcomes and sponsoring educational research and innovation projects. But instead of allowing the council to do its work, the legislators went on to establish specific policies such as requiring passing exams for promotion in grades 3, 6, 9, and 12. As it turned out, not much of what the law stipulated was actually implemented because it was not adequately funded and because of lack of agreement between the council and the Department on their respective roles. And then, it ran out of time as the November 1992 elections brought a change in the governing party and soon another, more drastic, education reform was enacted.

The Education Law of 1993 attempted to decentralize the system, proclaiming that school autonomy and community participation was the way to achieve efficiency and excellence in the system. To drive the proposed reform through, it established a parallel structure under the Secretary, the Institute of Educational Reform, charged with transforming all schools into autonomous community schools within a period of three to four years.

Implementing the new reform encountered many difficulties, some self-inflicted, others stemming from misguided teacher opposition. The first difficulty was in finding a suitable Secretary to direct what indeed was the most comprehensive educational reform of the last 20 years. The Governor's first appointee was not confirmed by the Senate. A second appointee was confirmed but lasted 14 months, a victim of political expediency after having made too many enemies in the governing party and in the system. The third appointee had all the proper political blessings and immediately declared all schools "autonomous community schools," whether they were ready or not. Historians will most probably say that this reform was not too successful.

Trying to develop and implement a Five-Year Plan as all these changes were taking place required a flexible approach in our objectives and strategies and some patience.³⁷ Ongoing projects had to be explained all over and, as we shall see, some of the projects were terminated and new ones were undertaken. But through all this turmoil, the presence of the College Board admissions tests, the Advanced Level Program and, until 1994, the Guidance Information Service, continued to provide a sense of continuity and stability to the education community.

As we moved from the external environment to examining our programs and operations several weak areas became evident, some of them quite serious. As of FY90-91, only three of seven core programs were breaking even or better. These were admissions testing (PEAU), which was the largest revenue source and the major contributor to the Office's incipient positive balance; Latin America, the second major contributor; and BUSCA, which unfortunately was too small to have much impact on the overall situation. Of the deficit programs, Teacher Certification was by far the worst off. Another weakness was a deficient fee structure. Except for the admissions tests, fees were not raised regularly to offset inflation for fear that students could not pay more, and that schools would cease participating. They were increased only as a last resort. For example, the PIENSE I fee had remained unchanged for eight years and the Advanced Level fees for 10 years. Also, under the historic PROLAA philosophy that fees should be as low as possible, a student taking more than one Advanced Level test would pay less than half the fee charged for the first test.

There were two distinct "markets" for our programs in Puerto Rico, and it was important to approach them with different strategies. On the one hand, the services offered to the public schools were negotiated with the central administration of the Department of Education under a single contract. But the private schools had to be

37. During my first seven years managing the PROLAA there were seven different Secretaries of Education: Awilda Aponte (1984-88), Rafael Cartagena (1989), José Lema Moya (1989-91), Celeste Benítez (1991-92), Anabel Rodríguez Casey (1993), José Arsenio Torres (1993-94), and Víctor Fajardo (1994-2000).

approached individually. It became clear to us that marketing in this sector was insufficient and was not reaching the decision makers. To be sure, marketing as a specialized activity did not exist. Staff from Test Development and Test Administration took some time from their regular work to make presentations to groups of counselors and teachers, explaining the tests' content, scores and reports provided, and how to use these. After 1987-88, Janning Estrada and Santos Meléndez targeted principals from schools that were former customers and from potential new ones. This strategy produced some volume increases, but achieving more substantial results required more time than was available for follow-up visits. The PIENSE situation was more difficult because it had competition from other local providers who apparently had better service and offered more usable information for teachers to improve learning. Interestingly enough, many schools told us that PIENSE was a better test, but our service and score reporting were not.

The contracts with the PRDoE to provide SIPOE and Advanced Level tests to the public schools were inadequate and inflexible. The SIPOE contract required us to test all the eighth-graders for a fixed total dollar amount. This amount had remained the same from 1982-83 to 1987-88. In Advanced Level, we faced the same situation; the fixed amount remained unchanged for 10 years, so we had to absorb the annual inflation increases. In addition, all the workshops for public school staff related to these programs, as well as the PEAU workshops, were free of charge, unlike on the mainland where most workshops charged a fee.

Furthermore, there were new expectations that required more research and changes to the programs. The schools and colleges wanted us to deliver more information beyond the traditional scores, percentiles, and statistical summaries. The schools using SIPOE and PIENSE wanted to know more specifically what the scores meant about the student knowledge and how they could improve their teaching to increase the scores. The colleges also wanted more information about the meaning of PEAU scores; they wanted to understand the relation between the test contents and college work, and they were also interested in information about other student characteristics and how these related to their performance. These requests were not unlike the demands being made on the mainland, which had moved President Stewart and the Trustees to begin a thorough review of the SAT and other core programs. We were indeed heading in the same direction.

We did not do a thorough environmental scan for Latin American Activities. It would have required much time, and resources which were not available. But we had explored the situation with several contacts in our first visits to México; we had read reports about the expansion and needs of higher education there, and after the debacle of the early eighties were seeing signs of recuperation. Everything led us to think that there would soon be new opportunities to expand our presence in that country.

In the midst of our planning activities, two events occurred that should be related. The first was that in 1992 our landlord, Banco Popular, requested that we move from the seventh to the fifteenth floor because they wanted to consolidate all the bank's central offices in the building's first nine floors. It could not have happened at a better time because we were able to design the new facilities and add space in line with our Plan's expectations, and the landlord took care of all the construction and moving costs.

The second event was that in June 1992, the Board of Trustees met in San Juan. Puerto Rico was getting ready to commemorate the fifth centenary of Columbus's voyages of discovery, and the Trustees' meeting became the occasion for an early celebration. Puerto Rico's Secretary of State and Acting Governor hosted an official reception in their honor at the historic building of the Department of State to which cabinet members, legislative leaders, and distinguished educators were invited. The College Board's presence and its contributions to education in Puerto Rico were lauded by several speakers. The Trustees, President Stewart and the other senior officers left the reception with the distinct feeling that the College Board and the Puerto Rico Office had achieved a special place on the island that should be maintained and protected.

The major findings about the environment and about our programs and operations that we have described were the basis for our five-year plan. The essence of the plan consisted of five general goals and broad strategies that would guide our integrated overall future efforts and permeate the specific objectives and actions of the individual programs and the Office's units.

First, we had to focus on our core programs: accelerating their revision and updating; improving our reports to provide more relevant information; and developing new assessments. This would require substantially increasing our limited research and development work, relocating resources from other activities, and using whatever increases

in income over expenses we could obtain. A parallel five-year R&D plan was prepared that included receiving some support from the College Board's mainland research funds. Renewing the PAA was the first priority, but all programs were scheduled for revision. We did not receive any direct funding from NYO but in-kind support was readily available, mostly from specialists working on the new SAT project. Updating the core programs also required loosening up inflexible postures on testing and reporting to make these more educationally relevant. We planned an intensive staff development program to expose our staff to new currents and ideas, bringing in specialists from NYO, ETS, and local universities, and sending some of our professionals to specialized workshops on the mainland.

Our second goal was to grow and diversify in Latin America. Initially the strategy was to concentrate on Mexico where we had established a beachhead and where we had evidence of increasing interest in admissions testing and other assessments. Our aim was not only to expand PAA use but also to introduce other programs such as PIENSE, SIPOE, and English as a Second Language tests. The decision was made to actively seek customers, and Mr. García Garza was asked to make additional promotional visits to secondary schools and universities. These first contacts were to be followed by well-planned one-day visits where I joined him in making presentations to institutional authorities and governing bodies responsible for admissions and assessment.

A third goal was to review our contracts with the PRDoE and be open to consider other contract work from the Department, schools, colleges and other organizations, as long as it was not incompatible with our mission. Educationally, it was in the public schools where SIPOE and Advanced Level were most useful and needed. But the economic reality of most public school students did not permit them to pay the fees. Neither program could continue if the Department did not pay for them. In a way, the Department had turned this fact to its advantage and continued allocating only minimum funds year after year. Our strategy was to change the contracting assumptions, arguing that we were providing many additional services to the schools, including special reports, while being paid only for the tests. For us to continue offering these other services and conduct educationally relevant research for the Department, it was necessary to increase the funds available for both programs, to remove or increase the contract maximum amount cap, and to revise both at least every two years to offset inflation.

Our fourth strategic goal was to continue and accelerate the technology modernization initiatives of the previous years, changing from a data-processing paradigm to the more recent paradigm of information technology. By 1987-88, the Office had a modest Computer Center with the equipment and software necessary for conducting all of the routine data processing for the existing programs: registration, scoring, and reporting, on our premises. The Test Development Division soon had the personal computers and statistical packages to conduct the required statistical analyses. But it was necessary to go beyond data processing to a new vision of the Computer Center focused on the production and transmission of useful educational information. To achieve this change of paradigm, it was necessary for computer staff to have active participation in the updating of the core programs, in the new assessments under development for the PRDoE, and in the new forms of analyzing and reporting under consideration. In conjunction with these initiatives, it was necessary to increase the use of technology for administrative operations, and to explore how technology could be integrated into the test development process. In 1992, a new unit was created to transform Data Processing into Information Technology—the Division of Information Technology and New Initiatives—under Rubén Vélez.

The fifth and last strategic goal was for the PROLAA to finally achieve stable fiscal health and produce a 6% in excess of income over expenses by the end of the five-year period. We negotiated with Mr. Rodgers that this goal would apply to the PROLAA as a whole, not to every program. Even this was quite a challenge because reviewing and updating the core programs would require more, not less, spending, and the same was true for increasing our presence in Latin America and strengthening promotional activities in the private sector in Puerto Rico.

We were counting on a combination of strategies to attain this goal. First, we established a reasonable fee increase policy to help offset inflation costs. Test fees and fees for related services, such as additional score reports, would be increased a set amount every two years but alternated so that the test fee and the fees for related services would not increase the same year. Second, we had to negotiate better terms for the assessment contracts with the Department of Education and establish the principle of annual review. And we implemented a policy of adding between 10 and 15% of overhead for all new contract work that did not involve student fees. We knew that even with this charge we would be doing the work for much less than a mainland provider. Third, we would intensify and improve promotional activities in the private school sector to gradually increase our share of the market. This called for designing new promotional materials and setting up promotion booths at all the local education conferences. Fourth, we had to negotiate all printing and shipping contracts on the mainland with a single provider to achieve economies of volume. Fifth, the strict cost containment measures established after 1988 had to continue in force.

The most difficult situation was the Teacher Certification Program, which had the largest deficit. Increasing the fees to cover the real costs of producing, administering and reporting the tests would have put an unreasonable burden on the candidates. We could not in the short run renounce our role of producing and administering the program. It was too important for Puerto Rican education, and we had accepted responsibility for it in a unique agreement with the Angel Ramos Foundation, the universities, the Department, and the teacher groups. We explored turning it over to the Department, but no one was happy with that solution. So we did the only honorable thing and negotiated with Mr. Rodgers to continue subsidizing the program as long as the Office as a whole did not incur a deficit. This would give us a chance to seek a definitive solution. Meanwhile, measures were introduced to reduce the deficit: fees were gradually increased in small amounts; we began charging for institutional reports and special research studies; professional and support staff was substantially reduced; new test forms would be developed every other year, except for the essay prompts; and the specialized tests would be printed on our small offset printer. These measures would mitigate the problem but not solve it.

Our major strategy was to seek an external subsidy that would allow us to keep the fees reasonable and to develop the program to its full potential. In 1992, we called a meeting with all pertinent parties on the occasion of PCMAS's fifth anniversary and discussed the program's achievements and limitations, including the volume statistics and the fiscal situation. We advised the group that no new developments were possible, and that unless external funding was found, the College Board could not maintain the program much longer. There was general agreement that every effort should be made to continue the program under the College Board and that public funds were needed to support it. It took several years before we could "convince" the Department to subsidize the program, but we were eventually successful.

Looking back on this first comprehensive strategic planning experience one must say that in addition to the significance of the plan itself, it marked two very important changes in the PROLAA's outlook and practices. First, we all began adopting a more business-like approach in our operation, openly recognizing that in order to achieve our educational mission, we had to adopt and adapt to some business practices. Thus we began to use concepts like "market," "marketing," and "market share" more or less comfortably. Second, it accelerated a change in management styles that was initiated in 1988. By its very nature, strategic planning was participatory. Preparing program and Office plans, monitoring progress at frequent intervals, modifying objectives and strategies, preparing annual reports, all these were tasks that required group participation. In addition to the planning committee, soon there were other groups to coordinate research and development, technology, and to improve score reporting. These committees were interdivisional, emphasizing that no single division owned these areas, and all the professional staff, not just the directors, participated. It was necessary to overcome some resistance and even animosity among different units. But gradually the committees became regular structures, and we all learned to share and participate efficiently in planning and decision making. In 1996, we held a two-day, all-staff retreat at outside facilities to evaluate our achievements and failures, which was so well received and productive that it became an established feature.

C. A Landmark Study of Transition to College in Puerto Rico

The 1990 conference on transition and the appointment of a Blue Ribbon Commission. On October 2, 1990, the Association of University Presidents and the Puerto Rico Office joined to sponsor a conference on transition from high school to college in Puerto Rico. Over one hundred educational leaders came together for a full day to honor Adolfo Fortier, discussing the issue that had been so close to him for more than 25 years. This conference was important because it was the first time that transition to college was critically examined out in the open by all the relevant parties. It was generally accepted that Puerto Rico had made much progress in creating opportunities for higher education, thanks largely to the federal and local financial assistance programs. But there was increasing concern with the difficulties faced by high school students entering college. At the end of the day, three things were clear: First, access as such was no longer the major problem but low success rates once the students were in college indeed was. Second, a comprehensive independent study of the different factors affecting transition was needed. Third, the College Board was the most appropriate entity to conduct such a study.

As was to be expected, we immediately accepted the challenge, and several of the leaders present confirmed their organization's commitment to help fund the project. We explored with key people the best way to organize and conduct the study so that its recommendations would carry weight in the educational community. It was agreed that a blue-ribbon commission representative of the pertinent education sectors, supported by several researchers and the PROLAA staff, would command the desired respect.

The commission was formally appointed in October 1992. It was made up of 11 distinguished educators. Chancellor Margarita Benitez of the University of Puerto Rico at Cayey, and President Salvador Santiago of the Caribbean Center for Graduate Studies, co-chaired the commission.³⁸ Dr. César Rey, a sociologist, was granted a half-time paid leave from the University of the Sacred Heart to be executive coordinator of the commission. Financial support was provided by the Carvajal Foundation, the Association of University Presidents, the General Council of Education, the Council of Higher Education, and the Office of the President of the College Board. During a two-day retreat, the commission defined its objectives, identified the areas of major concern, organized its working calendar, including meetings to hear from other education leaders, counselors, teachers and students, commissioned five special research studies, and requested statistical and other information from the PROLAA.

The five research studies commissioned covered the areas that the commission considered most critical: (1) Academic Preparation for College and College/High School Curricular Articulation, conducted by Dr. Luz Maritza Fernández, Professor at the Graduate School of Education, University of Puerto Rico at Río Piedras; (2) Guidance and Counseling Services for Transition to College, conducted by Dr. Felix. M. Pérez, Professor at the Graduate Program in Counseling at the University of Puerto Rico at Río Piedras; (3) Undergraduate Admissions Criteria and Practices in Puerto Rico, conducted by Dr. Carmen A. Collazo, Professor at the Graduate Program of Education, Inter American University of Puerto Rico; (4) The Individual Cost of Studying College in Puerto Rico, conducted by Dr. Ida de Jesús, Professor of Economics at the University of Puerto Rico at Río Piedras; and (5) Incidence and Reasons for Desertion in the First Two Years of College, conducted by Dr. Celia Cintrón, Professor of Social Sciences at the University of Puerto Rico, Río Piedras Campus.

Antonio Magriñá, our psychometrician, coordinated all research work, designed samples of institutions and high schools based on characteristics of the students who took the admissions tests, and came up with a master questionnaire to collect information in the 13 sampled colleges and another for collecting information in 27 high schools. Over 2,528 college students and 3,100 high school students were surveyed. In addition, the researchers conducted numerous personal interviews and focus groups with students, counselors, and other relevant professionals in college and high school settings.

The Blue-Ribbon Commission's Report was presented at a special conference on March 29, 1994, which was attended by President Stewart, the Secretary of Education, and most of the higher and secondary education leadership. The Report acknowledged the dramatic increase in higher education opportunities that took place during the previous 25 years. But it warned that this great social accomplishment was falling short in some of the positive outcomes expected for the students, their families, and society. Too many of the students admitted to higher education were not doing well. They faced numerous difficulties, some originating in their high school years, others encountered in the college environment, which produced slow academic progress rates and were leading an estimated 40% of them to drop out of their initial college choice after the first two years. Even if some of these students transfer or return to another institution later, the fact remains that this desertion rate constitutes a great loss of personal, institutional, and social resources. Concerning this situation, the commission said that it has avoided talking about a "crisis" because the concept has been overused, but considers it its responsibility to point out "that the situation is serious, and in some respects, grave."

We cannot discuss here the hundreds of findings, analyses, and recommendations contained in the 57-page report and in the supporting research studies. But this report became a landmark contribution to education in Puerto Rico. It was discussed and analyzed in many professional meetings; it was used to justify many funding proposals and as

38. In addition to the chairs the other members were Dr. María de los Angeles Ortiz, Vice President for Academic Affairs, Ana G. Méndez University System; Dr. Eduardo Rivera Medina, Professor of Psychology and former Dean of Academic Affairs, University of Puerto Rico at Río Pideras; Dr. Estela López, Vice President for Academic Affairs, Inter American University of Puerto Rico; Prof. Carlos ChaRdon, Former Secretary of Education of Puerto Rico; Mr. Carmelo Ortiz Montes, Assistant to the secretary of Education and former District Superintendent; Mr. David Wells, Superintendent of American Military Academy; Dr. Reinaldo Cabán, Professor of Engineering and former Dean of Academic Affairs, University of Puerto Rico at Mayaguez; Mrs. Carilín Catasús de Frau, Director of Admissions, Catholic University of Puerto Rico; and Dr. George V. Hillyer, Professor of Pathology, University of Puerto Rico Medical Sciences Campus

inspiration for several interesting projects. At the Puerto Rico Office, we found confirmation for much of what we were already doing as we implemented our Strategic Plan. Thus we find it pertinent to summarize and comment on its major findings.³⁹

The commission found important deficiencies in the students' academic preparation. Scores on the internal tests administered by the public schools and on the five College Board admissions tests showed low achievement levels in basic subjects and in linguistic and intellectual skills in the student populations as a whole. Several factors seemed to be contributing to this situation: Poor teaching, too much emphasis on knowledge as memorization, a school environment that does not stimulate learning and does not enforce standards, lack of studying habits and intellectual discipline, inadequate support at home, too much TV watching, extracurricular activities including part-time work, low self-esteem, and lack of clear academic and vocational goals. The result of these and other factors was that many students arrived at college unprepared academically. This was made worse because there was little articulation between the regular high school courses and the core freshman courses. The only exception to this general finding was the Advanced Level program, whose students had a less difficult transition as they had developed many of the skills and habits needed for college.

In addition to the usual calls for improving teaching and raising standards, the commission strongly recommended that the Council of Higher Education and the General Council of Education take the initiative to bring together teachers and curriculum specialists from both levels to discuss their respective curricula and find ways to articulate them better and avoid the shock many students felt when beginning college. The Commission further called for the College Board to bring together groups from secondary and higher education to identify and describe in a document the essential knowledge and competencies needed for college. This document would be of a general nature and not be seen as a specific curriculum. It should be made available not only to schools and teachers but also to students and parents, so that everyone had a clear idea of what was needed for college. Evidently, the commission members had become familiar with the College Board's *Academic Preparation for College*, the famous Green Book, and were proposing a similar process to develop one that would take into consideration the Puerto Rican situation.

The commissioners saw the Advanced Level Program as one of the few bright spots in preparation for college and an exception to a dismal picture which prevailed in too many schools. They saw that it exemplified several of the ideas that they were recommending for the general system: college/high school collaboration, a challenging curriculum, better-than-average teaching, high standards externally evaluated, and strong emphasis on developing study habits, reading, writing, and analytical skills. The commission strongly recommended that the program be expanded, acknowledged that the then recent Special Advanced Level Project (1993) included novel initiatives that could contribute much to improve transition to college, and called on the colleges to be more supportive.

As important as a deficient academic preparation was, the commission warned against using it as the sole explanation for lack of success in college. To do this would distort the more complex reality of the college-going student. There were important factors, other than the academic, which made transition to college more difficult for many of the students. Some of these factors were related to the broader transition from adolescence to adulthood in a society where traditional mores and support services were rapidly losing ground; others were related to a culture of poverty, social disadvantage, and dependency that still prevailed in Puerto Rico amid the undeniable advances made after the fifties. Dealing with these other variables required good, strong, sensitive guidance and counseling programs in secondary school and in college. But the commission found that neither program was delivering its full potential. Burdened by a high student to counselor ratio and often required by the principal to help with administrative chores, most counselors concentrated their time and efforts in supporting the graduating seniors in their college application process, coordinating activities with college recruiters, making sure that the students registered for the admissions tests, and when the scores arrived, advising them where they should apply. Other student needs, personal, social, and academic, got little attention. A particularly weak area was in vocational orientation. Little actualized information was available in the school about careers and there was not much time to provide support in choosing one in terms of personal interests, abilities, and the requirements for entering and completing it. The commission acknowledged as a positive step that the Department of Education was establishing new vocational information centers in each school district, but considered it necessary to completely reform the existing practices at the school level. It recommended a new model where the professional counselor would coordinate or manage a counseling team in which the principal, teachers, social worker, parents, students, and members of the community could play different roles.

39. See: The College Board, OPR/AL, Informe de la Comisión para estudiar la transición del estudiante de la escuela superior al nivel universitario, Marzo, 1994, 57 páginas.

The college environment was not ready for so many students who were not only academically unprepared but who had not developed strong personal and social strategies. The typical college campus was larger and less personal than the high school, professors were more distant, appeared difficult to approach, and often lacked teaching skills; old friends were gone, and it was more difficult to make new ones due to different class schedules; the courses were so different and there was so much reading to do. For many students, entering college was a real culture shock and too often a traumatic experience. These students were at risk of dropping out sooner or later unless the college had a strong counseling program and offered special support programs in a more receptive environment. The Commission found several good programs for students who had not met the minimum admissions requirements and who were socioeconomically disadvantaged. These programs had a very supportive environment and provided developmental courses, skills development workshops, personal growth activities, and intensive counseling, often using peer counseling. The commission called for the expansion of this type of program to serve students who had met the admissions requirements but who were really academically unprepared and lacked the personal and social skills to succeed. The commission further called for the expansion of peer counseling programs and for offering developmental programs during the summer preceding the student's entrance to college.

The commission found that close to one-third of first-year students were working part-time and that this number was rising. Whether out of real need for basics or to support a new lifestyle, the fact was that working was becoming a part of the transition to college and that course schedules, library research, team studying, conferences with teachers, and counseling visits, which were important activities for success in the freshman year, would have to be accommodated to the work schedule. Many students could not handle a full course load and were either taking a smaller one or even dropping out completely. The commission called on the Puerto Rico government to increase the amount of individual scholarships to above-average students so they could complete their degree on time.

Beyond the general findings described above, the commission found data directly related to gender differences. Women were a majority of the student population and were doing better than men in most of the academic indicators. But the commission noted that it found little evidence that colleges were responding with relevant programs, courses, services, and structures to meet the special needs and circumstances of women students. Although the desertion rate of women was lower than that of men, the reasons seemed to be closely related to traditional family responsibilities and loyalties characteristic of the female in our society or to new acquired responsibilities as a result of pregnancy and/or marriage. These situations required services and counseling not usually found in the traditionally male-dominated college environment, and the commission strongly called on colleges to make the necessary adjustments. On the other hand, desertion among males was increasing and was related to, among other things, lack of motivation, poor study habits, difficulties in handling pressure, and inability to postpone immediate financial rewards for longer range goals. The commission warned that the lack of academic success for so many male students was a serious situation that demanded a special study.

In reviewing the admissions situation in Puerto Rico, the commission confirmed that the availability of federal and local financial assistance had generated an unprecedented demand for higher education, a demand that was met by a slow expansion of the public system and, to a much larger extent, by the rapid expansion of private institutions. In this process, admissions criteria and standards have become more flexible. Of the 13 public and private college campuses studied, only two had selective criteria for the admission of new students. Although the other campuses required the PEAU admissions tests, the usual high school courses and a minimum grade point average, they used these indicators very liberally. De facto, most of them were operating as open admissions institutions. The commission recognized that open admissions had the effect of democratizing access, admitting many socially disadvantaged and/or academically unprepared students who would not have been qualified if they had to meet higher standards. But if the open door policy was not to become a revolving door, colleges must have special structures and programs to increase their probability of success. If these structures and support programs are not available, the student will fail and what's more, the overall quality of the institution may suffer. The commission found that the absence of such programs was a factor in the high dropout rate observed in some institutions, and called for creating more such programs and assigning local public funds for this purpose, much as the federal government was doing.

Concerning the cost of studying in Puerto Rico, the commission considered the federal and local scholarship and grant programs major contributors to increasing opportunities for higher education. But it warned that institutional costs were increasing and would force an increase in tuition and other costs to students, particularly so in the private universities. One of the commission's recommendations reminded us of those made by the Kilpatrick study in the seventies: that the government increase need-based financial aid available for students attending private institutions.

But the commission found evidence that students with above-average academic performance were getting behind because they had to work to support themselves. The commissioners recommended that in these cases, scholarship grants be increased to an amount that would allow these students to complete their degree in the expected time. Another deviation from a strict need-based policy was that special scholarships should be given to students pursuing careers that met important social needs. Beyond the financial aid recommendations, the commission called for a special public monies fund to support private institutions in specific projects, such as updating curriculum, faculty professional development, strengthening libraries, and research.

As one can see, the Study on Transition to College and the Five-Year Plan coincided in many of their findings and proposed activities. Consequently, they both influenced the work conducted by the PROLAA during these years. For example, the *College Board Guide to College Studies* was out even before the Commission's Report became public, and it addressed one of the major problems described by the commission: the absence of reliable information for a successful transition. And many of the new initiatives taken by the PROLAA responded directly to the issues raised in the Report. As we explain the renewal of the core programs and the new initiatives developed after 1994, this will become evident.

D. Renewal of the Core Programs and New Services

Updating and improving specific aspects of our core programs was an ongoing activity at the PROLAA. During the transition years (1987-92), this activity increased in response to our changing environment. In 1992, the Five-Year Plan integrated these initiatives into a comprehensive research and development effort focused on more substantial revisions and supported it by reassigning resources from different sources: the operational budget, the excess income produced by the external contracts and from the increasing test volume. By the end of the decade, the admissions testing program, the assessments and guidance service for secondary schools, and the Advanced Level program had been updated or transformed, and the PROLAA achieved new heights in its tradition of service to the schools and students of Puerto Rico.

Changes to the Admissions Testing Program (PEAU)

The Achievement Tests. Since 1985-86, the PROLAA had been conducting research to strengthen the information provided by its flagship program: PEAU. Colleges and schools were requesting more specific information about the achievement levels in each subject beyond the single score and percentile ranks. The Achievement Tests had been originally developed for helping placement in freshman courses and had been used effectively for that purpose. But entering students were more diverse in their preparation and readiness for college. Many institutions had been “unofficially” moving toward an open door admissions policy, and retention rates were decreasing. The Advisory Council held several meetings to address this situation and requested our Test Development staff look for new ways of reporting achievement. The PROLAA had experience in reporting partial scores within a given subject as PIENSE incorporated this feature when it began in 1984-85. Therefore, it was decided to conduct the psychometric research needed to obtain partial scores from the Achievement Tests in Spanish, English as a Second Language, and Mathematics.

In 1987-88, seven partial scores were reported in a 20–80 scale for the first time: Spanish Grammar, Spanish Literature, English Grammar, English Reading, Algebra, Intermediate Algebra, and Geometry. Pilot studies with samples from six institutions were conducted through 1989-90 to determine the best use of the partial scores for placement, and in 1990, workshops were conducted for admissions staff and counselors in all colleges to discuss the findings.

In conjunction with developing partial scores, other projects were developed to strengthen the admissions testing program during these years. A canonical study was completed to detect overlaps between the five PEAU tests; Item Response Theory was experimentally used to analyze the PAA, and subsequently became an established practice; and several new equated forms of the five tests were developed. In 1990, the Advisory Council requested a more thorough study of the Achievement Tests. External subject-matter specialists were commissioned to work with the staff to examine the tests' content and structure and determine if it aligned with recent curricular revisions and new disciplinary approaches. The three tests' predictive validity was also studied using scores from five different forms used during the previous years.

After these studies were completed, the test committees introduced changes to the three tests, more substantial in Spanish and less so in English and Mathematics. Both the Spanish and the English tests integrated a more modern approach to language, focusing on correct language use rather than on traditional grammar. In response to the growing awareness that writing skills were in trouble, the Spanish test added a section of multiple-choice items on writing and to make space for this, eliminated a section on authors and literary works, which was mostly memory recall. The Mathematics test incorporated more items requiring applications of mathematical knowledge and problem solving and was extended with 10 more items, and 5 additional minutes. After the needed pretesting and statistical analyses of the new items, the revised achievement tests were administered operationally in October 1997.

The COP and the College Seniors Profile

Another important renewal project to improve the information provided by the PEAU was the revision of the *Cuestionario para la Orientación Postsecundaria (COP)*, our local SDQ, which had been introduced in 1974-75. The PROLAA regularly published a report that included a brief introduction summarizing some of the data, an index of cross tabs, and over 40 pages of statistical tables. Some minor changes had been made to the COP since the seventies, but by 1990 it became evident to us that it had aged and needed substantial revisions to regain its status as perhaps the most important source of information on college-going students on the island. We assigned this work to Rubén Vélez who conducted surveys, focus groups, and personal interviews with college staff to explore how they were using the COP report. What we found was quite a surprise. On many campuses, the reports were not known beyond a specific office, and others who could have used the information had to spend time and resources to collect it on their own. There were many more potential users that had not been originally identified, such as counselors, and the student affairs, financial aid, and academic departments. But perhaps the most important finding was that the report was not user friendly, it had too much raw data printed directly from the computer, and too little explanation, much less interpretation.

As a result of these findings and the suggestions received from users and potential users, the COP was revised. Some of the existing questions were modified to better reflect social changes, and a few new questions were added to explore variables such as parents' education, subjects studied in high school, dominant language, and others. The COP Report was redesigned to have two separate parts. One: the *Perfil de la Clase Graduada*, a profile of college-bound seniors which summarized in narrative text and graphic illustrations the most relevant information, including historical data on some of the variables. The *Perfil* was quite similar to the College-Going Seniors report put out by the Board on the mainland. The second part was the statistical summary with all the tables and cross tabs. These changes were very well received by the users.

A New PAA in tune with the New SAT .

In April 1988, Vice President Rodgers and Trustee Dean Whitla had informed the PROLAA Advisory Council that the College Board was ready to initiate a substantial revision of the SAT. Changes under consideration for Verbal Reasoning included eliminating antonyms, analogies and sentence completion, and adding more reading to assess higher level skills. In Math Reasoning they were looking into the possibility of providing partial scores for Algebra, Geometry, and Trigonometry. Also, a writing test was possible. Upon hearing this information, we proposed that the PROLAA be included in the project in order to maintain the similarity between the SAT and the PAA. Rodgers advised that the project was still not well defined and promised to keep us informed, but we got the feeling that we would have to renew the PAA on our own. As the discussion of the changes was coming to a close in early 1990, we were asked to comment on them and on the possible effect on the PAA. Our test development staff was very critical of the changes, feeling that they would weaken the SAT psychometrically. My own worries were other: These changes would put pressure on the PROLAA to modify the PAA in the same direction; we did not have the financial resources; and some key staff had to be convinced that these changes were good. (Maldonado, *Memo to Steve Graff*, July 3, 1990.) Upon receiving our commentaries, Rodgers brought up with Fred Dietrich and Don Stewart the question of funding the PAA revision, suggesting that it be considered "hidden costs" in the SAT project. I never understood what that really meant, but, anyway, the final outcome was that we had to finance this and all other R&D projects included in the Plan with whatever excess income the programs and the external contracts produced, even if this implied not meeting the 6 percent goal.

In October 1990, the College Board, Board of Trustees approved major revisions for the admissions tests although they did not go as far as originally thought. The ATP was redefined as having two components: the SAT Reasoning

Test™ and the SAT Subject Tests™. The critical changes were focused on the SAT Reasoning Test (currently this test is simply referred to as the SAT). The verbal section of the SAT eliminated antonyms, retained analogies and sentence-based questions, and included much longer critical reading passages and emphasized vocabulary-in-context. The mathematics section added new student-produced response questions that required a special answer sheet for electronic scanning. No partial scores would be reported, and calculators would be allowed. The revised SAT was to be ready in the spring of 1994. The SAT Subject Tests would be expanded to include a new writing test with multiple-choice, new tests in Asian languages, and entry-level tests for basic Math and English. These changes in the ATP were supported by recommendations of a Blue-Ribbon Panel, appointed in 1988 to review the program in a far-reaching report whose title *Beyond Prediction* signaled a major shift in the nature and purpose of admissions testing. The report called for admissions tests to be more educationally relevant, “reinforce a rigorous high school curriculum and reward accomplishment,” “deter educationally unproductive forms of coaching,” and “give a better measure of the varied talents of an increasingly diverse student generation.”

As the College Board and ETS were engaged in developing the revised SAT, we continued updating the achievement tests, working on the new COP, the college-going seniors report, supporting the transition to college study, and beginning the implementation of the Five-Year Plan. We decided to wait for the SAT project to advance more and learn from their experience before initiating the renewal of the PAA. I participated in several meetings on the mainland to discuss progress reports, and Vice-President Rodgers arranged for ETS staff to visit the Office and conduct several technical workshops. Our test development staff became more familiar with the changes and less critical of them. In 1993, Carlos López, who was the initial lead for the project, retired and José Ruiz Vega was appointed to direct the New PAA project. He would also coordinate the work for renewing the Achievement Tests.

By late 1992, we felt we were ready to begin. The input we had from the Advisory Council and from key college presidents and academic deans whom we had contacted was that the PAA should remain close in its concept to the SAT. But we decided to explore the reaction of a much larger and representative group to the specific SAT changes and the desirability of introducing these to the PAA. The response was generally positive toward maintaining a close similarity to the SAT. Reaction to specific changes was diverse. Eliminating antonyms and adding more demanding reading passages was overwhelmingly supported. The double reading passages for comparative analysis was enthusiastically received by the college academic people but less so by counselors and public high school staff, who were afraid this would make the test too difficult for many students. In the mathematics section, the inclusion of more items involving problem solving in real-life situations was generally well received. The new student-produced response items were welcomed by math people at all levels. The idea of allowing calculators brought up issues of equity, and we decided to hold any decision until we could conduct a study on calculator use in the schools. In general, the teachers and counselors from the public high schools were less supportive of the changes proposed, because they felt that the test would be more difficult for the students.

By the end of this extensive consultation, we felt satisfied that our constituencies would support the new PAA, but we knew that much work had to be done with the high school teachers and counselors so they would feel more comfortable with the changes and could help their students. Soon, test development activities and the experimental administration of new items and test content was going full speed ahead. Consultants from ETS were brought in to train item writers and to give advice on technical and practical issues. A study was conducted in our most inclusive PEAU administration to determine what access students had to calculators and to what extent they were used in the schools for teaching and on tests. It was found that the majority of students did not own a calculator and did not use one in school or in their homework. This being the case, allowing calculator use would favor those students who had experience

What's In a Name?

On April 30, 1993, the issue of the change in the SAT name from Scholastic Aptitude Test to Scholastic Assessment Test was discussed in the Advisory Council. Trustee representative and distinguished psychometrician, Robert Linn, explained that they wanted to get away from the concept of aptitude, which sent the wrong message that it is something you are born with, rather than abilities you develop in school and life. The PAA's name, Prueba de Aptitud Académica was a translation of the original SAT name. So, should we change it and how? There was agreement that the Spanish word aptitud sent the same message as its counterpart in English, but we could not find a common usage word in Spanish, beginning with the letter “a.” Some educators were beginning to translate assessment as “avalúo,” but it was not common usage. Then it occurred to me that most people did not talk about the Prueba de Aptitud Académica, nor about the Pruebas de Evaluación y Admisión Universitaria (PEAU). The common usage was to refer to the tests as the examen de admisión (the admissions exam) or more frequently as el college board (the college boards). When the Council members confirmed that this was the case, Dr. Linn said that perhaps we should not change the name. So until today, “aptitud” remains in the PAA’ official name.

with them over the majority that did not. The decision was to not allow calculators. We soon announced that the new PAA would be ready for October 1996.

Parallel to this test development and research activity, a plan was implemented to inform teachers, counselors, and school principals of the changes to the tests and how they could help their students to get ready. Booklets explaining the changes were sent to high school teachers and counselors. In coordination with the Department of Education, one-day workshops were conducted in each of the eight Department's regions for teachers and counselors from the region's districts. Similar workshops were conducted for the private schools. Also, presentations were made in all the major education conferences held during these three years. We also held a special TV program in coordination with Channel 40, sponsored by the Ana G. Méndez University System. A video-tape aimed at students was prepared with grants from Pepsi-Cola and the Triple X Health Insurance Company. The tape was transmitted over TV, and two copies were distributed free to all high schools for the counselors and teachers to hold group orientation sessions. Finally 80,000 copies of a new guide for students taking the admissions tests were sent to all high schools.

The new PAA was administered as planned on October 19, 1996, to 24,176 candidates for admissions, 4,403 fewer than in October of the previous year. It was evident that more students took the old test in its last administration in June to avoid the new one, thinking it would be more difficult. Statistical analyses conducted by Magriñá and Gary Marco (from the SAT group at ETS) did suggest that the difficulty level was higher than desired and that the test was speeded. This was corrected for the February 1997 administration. Another important decision was made: the PAA scale would not be recentered because its observed mean had stayed closer to the scale theoretical mean than the SAT. Thus we avoided some of the bad publicity that came with recentering the SAT, which some people understood as a way of lowering the standard to favor equity.

New developments in our secondary school programs.

Renewal of PIENSE I and Development of PIENSE II. Trustee Linda B. Salamon acknowledged on April 30, 1990, at the Advisory Council meeting that "as to programs for secondary schools, the PROLAA is ahead of the mainland College Board, having developed the Guidance and PIENSE programs" (ACPROLAA, *Minutes of April 30, 1990*, Page 5). As we know, the Guidance Information Service (SIPOE) became operational in 1976 and was designed for use in eighth grade in public and private schools. The PIENSE battery became operational in 1985 and was originally normed for use in sixth and seventh grade in the private schools which typically had higher achievement levels than the public schools. The PROLAA soon began working on a second level for grades 9 and 10. The idea was to have an array of tests for sixth through tenth grade, assessing cognitive development, verbal, mathematical, and abstract/mechanical reasoning, and achievement in Spanish, English as a Second Language, and Mathematics, plus the personal data questionnaire exploring occupational values and occupational preferences. It was expected that the complete suite would be very attractive to the private schools and perhaps to special public schools. Development of the PIENSE II battery began in 1988-89, and norming was completed in March-April 1990, with 4,932 students from 47 private schools. The new battery, like PIENSE I, consisted of four tests: cognitive development and three achievement tests. Whole-subject scores and partial scores in specific areas within each subject were reported on the achievement tests. Test committees for each subject were appointed and Dr. Jorge Pérez Coffie, professor of Psychology at the University of Puerto Rico Cayey Campus was appointed consultant for the cognitive ability test.

Underlying the development of a second PIENSE level was the idea that the three test batteries could be vertically linked to create an impressive academic diagnostic system to be used by counselors, teachers, principals, students, and parents for guidance and career development, starting in sixth grade and leading right into the college admissions tests. As we have previously documented, in the early eighties, studies showed that the SIPOE tests taken in eighth grade could be used as indicators of future performance in PEAU. After PIENSE I was introduced in 1985, similar studies were conducted adding its scores to the equation. In 1990, Janning Estrada reported that initial analyses were very promising: the combined use of these tests provided reliable predictive information that could be used for counseling at four different stages, from grades 6 to 12. Antonio Magriñá found that grade point average also correlated strongly into the prediction, and that factor analyses strongly supported using the tests vertically as a system. (*Academia*, Vol. 3, # 1-2-3, 1990; and ACPROLAA, *Minutes of the Meeting of April 30, 1990*).

As part of this ongoing project, the PIENSE score reports were redesigned in 1992. A verbal description and a graphic rendition of the subject and the partial scores were added in the individual report so that parents and students could understand them better. The school reports now included a separate report for each homeroom, with subject and partial scores, percentile rankings by age and grade, and a statistical summary.

As things turned out, the idea of using the three test batteries and the admissions test as an integrated vertical assessment system for secondary school was to be first tried out fully in a private school system in México in 1994. And the new PIENSE II battery found a niche, standing alone, as an admissions test in several state universities' large preparatory schools' systems in that country in 1993. But these developments will be described later when we look into the restoration of Latin American Activities.

The College Board Guide to College Studies in Puerto Rico. (Guía del College Board para los Estudios Universitarios en Puerto Rico). Another aspect of the renovation activity that took place during the early nineties was the development of a guide to college studies. Back in 1965, the PROLAA had initiated a four-page leaflet with very basic information on the five or six existing higher education institutions and distributed it free to all students registering to take the admissions tests. This publication was discontinued later, but a private school counselor and director, Father José Bassols, took it upon himself to put out a similar but larger publication for counselors adding information on noncollege postsecondary institutions. In 1991, Father Bassols suggested that the PROLAA take back this responsibility, and his suggestion was discussed with the Advisory Council who fully supported the idea. Ilia Serra, an aide to the executive director, was assigned to manage the project in close collaboration with Miguel Cintrón, the assistant director for Publications. Janning Estrada was responsible for most of the content changes and additions.

The new *Guía*, which was published in 1992, was a unique publication in Spanish and designed specifically to support transition to college in Puerto Rico. It borrowed ideas from two College Board mainland publications: the *College Handbook* and the *Index of Majors*. The information about the 53 existing college campuses was collected using essentially the same categories as the *Handbook* but adapted to our situation. A list of 319 specific majors organized by broad fields of knowledge was followed by an index of majors in which the student could search for the institution offering each major and the degree, from associate to graduate. These two information sections were preceded by three articles written by counselors. The first one discussed how to choose a major and the appropriate college to fit the student's goals and situation. The second article explained how to pay for a college education in Puerto Rico, with special emphasis on how and where to apply for the available financial aid. The third one offered practical advice on how to succeed in college, including testimonies from real students. The three articles were written in a lively, direct, nonacademic style with illustrations and questions to actively involve the reader. Maps of the island and the metropolitan area were also provided with the 53 institutions located in them. To sum it all up, a workbook exercise with all the steps the student should take to apply to college, and space to write in the dates, was also included. As we can see, this Guide to College provided information and guidance. It was sent free to all counselors, and the students could order it for \$5.00 when applying for the admissions tests.

Transformation of the Guidance Information Service: From SIPOE to the Sistema, to CEPA. In our initial review of the core programs it became evident that the Guidance Information Service (SIPOE) had aged and required updating. In 1992, some changes were made to the questions exploring student interests to make it more relevant; also, the information collected about special education students was enhanced, and a large-type version of the three reasoning tests was printed for students with visual impairment. But we were aware that more substantial changes were needed, and these were undertaken in 1993. The project began with two one-day meetings with counselors from the public and private schools to explore their ideas on the changes that should be made. A large number of counselors attended the meetings, and we got excellent feedback and suggestions on changes that would support their work better. We were ready to begin. A Steering Committee of public and private school counselors was appointed, Dr. Lina Giusti, Graduate Professor of Counseling at the University of Puerto Rico at Río Piedras, and Dr. Carmen Cancel, Graduate Professor of Counseling at Inter American University, were hired as consultants. Janning Estrada managed the project.

The initial idea was to retain SIPOE's original structure of three reasoning tests and a personal information questionnaire and to have the new instrument ready for 1996-97, the target year for the New PAA. The verbal and mathematical reasoning tests were to incorporate many of the New PAA changes in order to facilitate vertical alignment. The mechanical/abstract reasoning test would be transformed and redefined as a mechanical/spatial reasoning test to be more useful for occupational guidance. The new improved Personal Information Questionnaire was to be expanded adding an Academic Self-Evaluation Scale and an Occupational Interests Scale. As the project was beginning, we faced a major setback when the PRDoE told us that they had no funds for continuing the SIPOE contract. Probably this was the consequence of the instability in the Department's administration, which affected decision making at middle levels. As we know, this program was originally developed with a grant from the Department. After it was operational, it was funded with annual federal grants, but the Federal Department of Education believed it was time for the PRDoE to take over this responsibility. Apparently no one in the new

administration was aware of this, and no local funds had been assigned. When the bad news came, we decided to continue the project, expecting that a substantially improved SIPOE would get the Department to use it again. Several years were to pass before that happened, and then it would not be a New SIPOE but a different guidance instrument.

Meanwhile, we continued SIPOE in the private schools, and in two special projects, one in a Catholic school system in Mexico, and the other as a free contribution to the San Juan Metropolitan Alliance's project for underprivileged students. Later both projects would become testing grounds for using the complete array of PROLAA assessments into the integrated guidance model envisioned by the PROLAA. Another event was to influence the future course of the project. In 1994, the Commission to Study Transition from High School to College in Puerto Rico presented its report, and its findings concerning high school and college counseling were quite negative, particularly so with respect to academic and vocational counseling. In its recommendations, the commission called on the College Board to take a more active role in strengthening guidance in high school, expanding what it was already doing in eighth grade with SIPOE.

Intensive research and development work was to continue for three years during which time new ideas from the staff, the Steering Committee, and the consultants were incorporated and pretested. By 1996-97, it became clear to all that the original concept had taken a different character and that it was no longer a renewed SIPOE but a distinct and more powerful guidance instrument. The student questionnaire became central, requiring more time to respond and exploring the student's plans, interests, values, and perceptions more thoroughly through six sections of questions and standardized scales. The original SIPOE reasoning tests could be administered separately or together or not at all. In fact, they slowly faded away. The new instrument was administered experimentally for normalization in November 1997 to a total of 7,747 students: 4,918 from grades 7 to 12 in local public and private schools; 1,761 students from the same grades in Mexican private schools; and 1,068 college students in Puerto Rico. The latter group was needed for validating the occupational interests scale.

A different name was needed to emphasize that we had moved far away from SIPOE; it was decided to call it *Sistema del College Board para la Planificación Educativa y Ocupacional*, that is, the *College Board System for Academic and Occupational Planning*. This name was chosen to capitalize on the College Board's brand recognition in Puerto Rico and to send the message that it went beyond providing information. The *Sistema* was designed to promote a strong self-concept or self-knowledge in each student, to facilitate academic and occupational planning, and to support an adequate transition from secondary to high school, and from high school to college or the world of work. Unlike SIPOE, which was designed for the eighth grade, the *Sistema* could be administered from seventh to twelfth grades. Much of its content was based on the vocational development theories of Super and Holland, but it went beyond these. It integrated recent constructivist and humanist principles, focusing on the student to assume responsibility for his own education and future with the support of the guidance professionals, the school, the family, and the community.

The *Sistema* elicited student information and perceptions through six sections of questions and scales: general information on study plans and school subject preference and performance; an inventory of perceived abilities; an inventory of occupational values; an occupational interests scale; an inventory of working environment preferences; and an academic self-esteem and school motivation scale. There was also a voluntary and anonymous open question for the student to comment on the experience of responding to the instrument. Initially, this was intended to get a reaction from the student for internal use, but we soon decided to send it to the schools. Although not all the students responded, those who did, offered insights that could be useful for the school. The computer-produced report was a narrative and personalized student profile that summarized the students' responses to the questions and scales and included brief interpretations of related variables, based on guidelines prepared by the counselors' committee and the consultants. It also had new questions for the student to continue the reflective process. It also included the scores obtained by the student in the PIENSE or PEAU tests. A school report was also produced summarizing those variables that were relevant for a group profile and for the counselor and principal to plan guidance and teaching activities. One can readily see that these were not the typical test score reports prepared by the computer center. Producing the complex student profile and the school report was technically much more demanding. An external programmer was brought to work with the staff, and the reports were successfully produced.

After the *Sistema* was normed, we were able to use it integrated with the other PROLAA assessments in another project sponsored by the Metropolitan Alliance for Educational Reform in the Cataño School District, a small nine-school district that offered the three educational levels: elementary, intermediate and high school, in a town across the San Juan harbor. Most of its students were very poor, and the whole municipality was socioeconomically depressed.

Academic performance was low, and only a handful of students went on to college. The Alliance planned to give the district the intensive support that it needed. The PROLAA was asked to design an integrated guidance model and a computer-based student support information system to be used from seventh to twelfth grades. But this concept turned out to be too expensive, and we had to eliminate the computers, and focus on the model for academic and occupational guidance.

The guidance model designed for the Cataño District consisted of four major activity phases to be conducted cyclically from seventh to twelfth grade. The four phases were identified as: Diagnostics, Guidance, Student Development Plan, and Implementation/Monitoring. The Diagnostic phase would take place in seventh, ninth, and eleventh grades, using the Sistema, the appropriate assessment battery for the grade, (PIENSE I, PIENSE II, or PEAU) and any other relevant information available at the school, such as grades and other tests. This was to be followed by guidance activities leading to a student development plan. The school would be responsible for preparing with the student a development plan based on the information obtained from the different components of the inventory, the scores in the test batteries, and the student's interests and academic condition and other information the school had. The plan should include the courses to take the following year, developmental experiences as needed, and extracurricular activities to support the student's overall growth. Once the development plan was agreed to, implementation and monitoring the student's progress would follow. And then the cycle would begin again with a second diagnostic phase. Two student workbooks were prepared, one for seventh through ninth and the other from tenth to twelfth grades. These workbooks incorporated elements of a portfolio and a reflexive diary to stimulate the student to think about the process and to keep track of his development. (Janning Estrada, *Modelo Individualizado para la orientación educativa y ocupacional*, June 10, 1998.)

Implementing this model required training counselors and other school staff and stimulating parents to involve themselves in their children's process. The PROLAA designed and conducted workshops and presentations for the counselors and school staff, while other Alliance members conducted activities for parents, teachers, and school directors throughout the five or six years that the project was funded. At the end, not all that we expected was achieved, but the number of students going on to postsecondary studies did increase.

By 1999, the transformation of our secondary school programs was essentially complete. The idea of integrating the new guidance Sistema, with PIENSE I, PIENSE II, and the PEAU admissions tests was in itself attractive, even more so when the workbooks, the *Guide to College Studies*, and the workshops for counselors were added. One of the first users was the Department of Education's Tech Prep Project, which operated in 26 vocational schools. This was followed by a number of Gear-Up, School-to-Work, and similar projects operated by several colleges for underprivileged students in public schools within their respective service area. Also, a good number of private schools that formerly used SIPOE and the PIENSE tests now used the new products.

At the College Board Forum that year we heard new Board President Gaston Caperton talk about his vision of a College Board system of assessments and guidance products to support all students moving through secondary to higher education. Later, Janning Estrada commented that we already had such a system operational, but we were using the name "College Board System" for one of the parts, the guidance inventory, not for the whole array of products and programs that the PROLAA had developed. Upon returning to San Juan, another name was given to the guidance program: *Inventario CEPA*[™] and the name "College Board System" was used for the totality of products and programs aimed at students from sixth to twelfth grade. Thus by 2000, the guidance instrument came to be known by the Spanish acronym CEPA, which stood for *Conoce* (Know yourself), *Explora* (Explore), *Planifica* (Plan), and *Actúa* (Act). As it happened, soon CEPA would take on a life of its own because it could be used alone or in combination with one of the assessments.

The Advanced Level program renews its remaining exams and develops a unique project with the Department of Education.

Updating the four examinations. As we have previously mentioned, the Advanced Level Program was facing serious difficulties around 1987. The number of active examinations had been reduced by half, and the PRDoE was having second thoughts about its level of support for the program. However, the report prepared by the Joint Commission to Study the Advanced Level Program had strongly supported the program, prompting the Department to continue its support and giving us time and space to restore its role and presence in the public schools. Although the opposition from the UPR Río Piedras Campus continued and made restoration of the full program impractical, a special project with the Department instilled new life to Advanced Level, extending it to substantially more schools and offering unique services to the students.

In addition to implementing some of the recommendations of the Commission's Report, test development and research activities to update the remaining four exams were intensified after 1993, coordinated by Assistant Director for Test Development, María Elena Vargas who joined the staff that year. Three studies were commissioned from external content specialists to survey the college curricula in Spanish, English, and Mathematics and make recommendations for updating the exams in these subjects and the corresponding course syllabus. A similar study of the Western Civilization college course required by all colleges was also commissioned in an attempt to explore the possibility of reinstating that exam.

When the curriculum studies were completed, meetings were held with department chairs from all the colleges to discuss the findings and seek consensus on the changes that should be made. An additional seminar was held with a sample of liberal arts program chairs to discuss substantial changes to the Math I exam, which was redesigned to meet the mathematics requirement of students majoring in fields not requiring calculus. The committees of examiners for each subject completed updating the content specifications to better reflect discipline standards, and item writers were assigned to write new items meeting the changed specifications. The Math committees evaluated the feasibility of incorporating student-produced response items and/or open questions to the Math tests, which at the time had only multiple-choice items. A survey of calculator use was conducted with the Advanced Level Math teachers and discussed with the examiners committee and the math college chairs, but no consensus was reached, and the issue was put on hold for further study. By 1997-98, constructed response and demonstration questions were introduced operationally in the Math II examination. A round of testing for validation of the tests' norms was conducted with samples of college students, and their grades were collected for a predictive validity study. At the request of the readers, essay scoring was strengthened, defining more analytical rubrics in order to increase the efficiency and reliability of the scoring process. This work went on over several years and was very important in restoring credibility to the Advanced Level program.

A unique project for public school students. A crucial development took place simultaneously that was to impact the future of the program like nothing else since its beginning. In 1993, a recently appointed Secretary of Education fully understood the true potential of the program for the public school student and decided to support it to an unprecedented level. Dr. José Arsenio Torres had been my professor of Social Studies at the University of Puerto Rico in 1953-54 and later my colleague in the Faculty of General Studies. As soon as he was confirmed by the Senate, I requested a meeting to explain the different projects the College Board had with the Department. From the beginning I knew this would not be a proforma conversation. He talked with great conviction about his plans for strengthening the quality of education. Naturally, I brought up the Advanced Level program, and he questioned me about its status. I gave him a copy of the Report which I "happened" to have with me. A few days later, the Secretary called me one evening at my home to ask if the Report's recommendations had been implemented. When I told him only those we could afford had been implemented, he asked how long it would take to begin a project implementing them and if I could prepare a proposal immediately. He made it clear that the proposal should go beyond paying for the exams, and that it had to provide innovative activities and all the books for the students, and intensive training and support for the teachers. I promised to have the proposal ready in a week.

While preparing the proposal with the staff and realizing that it would require several hundred thousand dollars, we wondered if it would ever become reality. The newspapers soon answered that question. The Secretary had added funds for offering college courses to deserving students to a controversial administration bill that would provide vouchers for students to attend private schools if they were displeased with the public one they were attending. This bill was a campaign promise of the new administration but was strongly opposed by teacher groups and by many educators. But Secretary Torres gave it a new twist by requesting vouchers to move from one public school to another and from a private school to a public one. These new dimensions of the Law for the Free School Choice and Special Scholarships was not noticed by many in the heated discussion that followed, but it was an act of justice because the generalized perception was that **all** public schools were inferior to private schools, which was not the case. The idea of providing deserving students the opportunity to advance their education by taking college courses in high school was a way to improve the public school experience so that the students would be less inclined to leave. The voucher program was ultimately found unconstitutional, but the Advanced Level Special Project (ALSP) became a successful program that subsequent Secretaries have continued to support with other funds up to this day. It is unfortunate that Dr. Torres's contribution was not fully recognized.

The ALSP began on a fast track. We had the proposal ready before the bill became law, and the contract was ready soon after. The project was operational by the time the 1993-94 school year began in August. Any school offering at least one Advanced Level course was ipso facto a project participant. There were four major goals: to strengthen the

Advanced Level Program as the major, if not the only, program for above-average students in the public high schools; to increase the number of participating schools and students; to provide support to the teachers through continuous in-service training, materials and other activities; and to expose the students to a program of complementary cultural and academic experiences that would excite their appetite for college. Achieving these goals called for close collaboration between the Department, the colleges, and the College Board.

Professional development activities for the Advanced Level teachers were critical for the program to strengthen its credibility with the colleges because it was attempting to reach more students in more schools. Since the late sixties, the PROLAA had conducted frequent two-week free summer workshops for beginning Advanced Level teachers. Later, the program's financial difficulties made it necessary to have these workshops less frequently and often to shorten them to no more than three days.

With Secretary Torres's approval, we used a different approach to support the Advanced Level teachers and other school staff. Before the ALSP began, principals, teachers, and counselors participated in orientation meetings to discuss the project's goals and operation. After the project's first year, an annual meeting was held with the principals to give them comparative feedback on the students' achievements, evaluate how the program was functioning, and discuss possible changes in teacher assignments and student selection. But the most important support activity was the seminar for teachers conducted in collaboration with the colleges. The Secretary felt that concentrating teacher training in a two-week summer workshop was not the best way because the teachers were left to themselves during the year when actual teaching would generate many questions and difficulties. Therefore, a different approach was used. Each teacher would participate in a yearlong seminar conducted by an experienced college professor. The seminar consisted of 10 three-hour sessions, held every three weeks at a selected college campus. It was focused on discussing the major readings and topics of the course and exchanging ideas on teaching and evaluation. Each teacher received a printed course guide that included the syllabus, suggestions on methodology, and a bibliography. Teachers also received a copy of the course guide prepared for the student. The college professors arranged for the teachers to have access to the college library and to academic and cultural activities. To make sure that all teachers could attend, 32 seminars were organized across the island, one for each of the four subjects in each of the eight Department of Education's established regions. The great majority of teachers attended the seminar regularly, year after year, and this became an important factor in their professional development and in strengthening the quality of the program, as was evidenced by the project's external evaluator. We also conducted three one-day workshops in the eight regions to help counselors develop their abilities and knowledge to properly advise above-average students.

If supporting the teachers was important, the project's support for the students did not lag behind. To make sure they had the required books, the Secretary included in the contract the provision that the College Board would buy and distribute all the books to the schools. In addition to these, students received the *College Board Guide to College Studies in Puerto Rico*, a guide for each course they were taking, and two dictionaries, Spanish and English, which were theirs to keep and take to college.

In addition to the books and materials, the ALSP organized a unique program of activities designed to strengthen student readiness and stimulate their appetite for college: the *Jornadas Universitarias* or college journeys. These went far beyond spending a day on a college campus. They were carefully designed learning experiences focused on different areas of knowledge and culture and offering direct contact with college professors and students. Colleges were asked to submit proposals that met two requirements: the activity had to be truly academic or cultural, and they had to be designed to stimulate active participation by the student. We did not want

the colleges to use this opportunity for promoting their campus, or to merely entertain the students, or worse, to bore them with traditional lectures. The following brief description of two *Jornadas* will evidence their special nature. At one college, the Department of Drama staged a short play for groups of no more than one hundred students. After the presentation, they would analyze with the Director and the student actors the different elements that went into staging the play: the play itself as a literary text, the author's intentions, and time, acting, scenography, illumination,

Because of its centralized bureaucracy the PRDoE had many problems with book distribution. When we met with the school principals and teachers in the summer orientation sessions, we advised them that books for all students would be in the schools within three months because we could not order them until a contract was signed. This announcement was received with incredulous smiles. In October, I received a call from a principal to tell me that the books had arrived, and he wanted to thank me for keeping my word. I transmitted the message to the project coordinator who told me that it was not true because the books were scheduled to be in that school later that week. Intrigued, we called back the principal and asked him to look up the accompanying documents and when he did, we discovered that they were not the books we were sending but books ordered by the Department almost two years before! Ours did get in the following day.

and costumes. The idea was to provide an authentic theater experience quite different from taking them “to see” a play. At another college, groups of ALSP students were introduced to the use of computers as learning tools through hands-on experience using applications in subjects of their choice. For many students from our public schools, this was the first time they actually used a computer. After the first two years, special three-day *Jornadas* were organized for smaller groups of students with special interests. One of the most successful was an introduction to film-making with the island’s foremost movie director.

Each student participated in two *Jornadas* during the year. During the projects’ first six years, 390 *Jornadas* were held and 29,805 students participated. Transportation for students was provided by the Department, and the PROLAA gave each student a lunch voucher. At least one teacher or counselor would always go with the students to the college campus. There were several spin-off activities initiated by students and teachers and supported by the project, such as literary journals, student conferences, poetry readings, and video productions. The annual conference of Advanced Level Teachers which predated the project was continued and strengthened.

The ALSP was evaluated annually by an external independent evaluator who presented his report to the Department and the College Board. Year after year, all the indicators evaluated were very positive. After the project’s first five years, the percentage of schools offering at least two of the four courses had increased 31%, and the program was offered in 82% of the academic high schools. The number of students taking at least one examination increased 34%, and the number of examinations administered increased 69%. The number of students who scored 3 or higher on the examinations reached 56%. These indicators continued to increase steadily, although they slowed down as the program reached most of the available population. Student satisfaction with the *Jornadas* was overwhelmingly positive, as was the teachers’ satisfaction with the seminar. As one can imagine, this project required many logistical arrangements and close coordination with the schools and the Department. We were fortunate to find a very competent person to manage the project. Ms. Ada Ramos, an active public school teacher, was granted a leave of absence by the Department and directed the ALSP since its second year until 2005.

Strengthening communications and the forum role: The annual Puerto Rico conference is established.

One of the persistent goals of the College Board was to serve as a forum for the discussion of relevant educational issues, particularly those related to the transition of students from high school to college. The Puerto Rico Office was no stranger to this role, and since the sixties it had occasionally convened meetings of the local Board members and had also sponsored several special conferences with a broader audience. But one thing was missing: there was no regular annual meeting of all its constituencies. One reason for this was that the PROLAA had no role in the membership structure of the organization. The local members belonged to the Middle States Region and could participate in their annual meeting and in its organizational business and councils. But the fact was that only a few members did because of the expense involved in travel and because the sessions were for the most part relevant only to a small number of private schools with large groups of students planning to attend college in the States.

The Advisory Council had suggested that we consider establishing a Puerto Rico meeting following the model of the regional ones on the mainland. The truth was that management had been too busy dealing with other more pressing problems and projects such as have been described and did not move too fast on the suggestion. In 1994, some members decided to force our hand. It was at the MSRO Conference, held at the Washington Hilton, that a group of about ten members from Puerto Rico, led by Ricardo González, of Cupeyville School, and Juan Consuegra, of American Military Academy, invited me to a “state” meeting they had called. When I arrived, they presented me a petition requesting that we have an annual Puerto Rico conference focused on our programs and the issues relevant to transition to college on the island, and promising their full support to make it a success. Needless to say, I accepted their request and promised to work with them to implement the idea. The first thing we had to do was to explain our intentions to New York and the MSRO so that they would not think we were trying to establish a separate region in Puerto Rico. This was achieved rather smoothly as we explained that the proposed annual conference would not compete in any way or take away the organizational functions of the Middle States meeting and the National Forum.

The first College Board Puerto Rico Annual Conference was held on May 11, 1995, at the Condado Convention Center in San Juan. It was a one-day activity focused on the admissions process. The conference opened with a paper on the new tendencies in admissions policies and practices, delivered by CUNY Vice Chancellor for Student Affairs and Puerto Rican educator, Elsa Nuñez. Her presentation set the stage for two panel discussions and several

concurrent sessions that explored admissions in Puerto Rico. There were 380 attendees from all the education sectors. The Secretary of Education, several college presidents and rectors, and most college admissions officers were active participants, and other attendees included school principals.

By any standard, this first conference was a success, and all concerned parties were aware that a tradition had been started. The following three conferences kept the one-day format, but by the fourth conference (1998), the organizing committee expanded it to a two-day event. By this time the Puerto Rico Conference had become one of the major educational events on the island because of the relevant themes, the quality of the presentations, and the opportunity it afforded the different educational sectors to come together. Attendance and the number of sessions increased steadily year after year. In the eighth edition, 924 people attended, which compared favorably with the College Board's multistate regional conferences. In addition to the academic and professional presentations and workshops, a Recognition Luncheon was added to honor the highest scoring students in the PROLAA assessments. For many years, Ricardo González remained a major force behind the conference, even when he assumed other roles in the PROLAA Advisory Council, of which he was chair, and later on the Board's Council on Guidance and Counseling. The committee was also fortunate to have the collaboration of several very able members from our colleges and schools. At the PROLAA, Ilia Serra, Miguel Cintrón, and Melanie Ortiz coordinated the staff effort in support of the conference.

Research activities and publications. The renewal of the core programs and the many projects conducted by the Office under contract or in alliance with other organizations during these years required much research work. Even as we added several full-time staff members, the Test Development and Research Division was never large enough for all the work it was expected to accomplish. Hence we implemented a strategy to bring in subject and testing specialists from nearby universities under part-time professional service contracts ranging from 30 to 40 hours monthly. These specialists held full-time faculty positions in their institutions but were permitted to do consulting work in their areas of expertise. Some of them were assigned to test development activities in specific programs or subject areas; others conducted research. We also continued the established practice of commissioning specific studies to external specialists, with the Test Development and Research Division providing much of the data and statistical support. This strategy of having part-time professional staff and consultants allowed the Office to tap into a wealth of expertise available in the academic community in a very cost-efficient way. It had the additional important benefit of strengthening the relationship with the higher education community.

A substantial part of the research conducted at the Office was for the internal use of the programs themselves, providing feedback to the committees of examiners and program managers to strengthen the assessments. This research included item analyses after pretesting and testing as well as determination of validity, reliability, and other psychometric indicators that were conducted regularly after each test administration and reported to the schools and colleges in the regular reporting process after each major administration. More extensive research work related to experimental administration of new assessments or specific parts of old ones, when new norms had to be established. This research was usually reported in technical articles or a special supplement in *Academia*.

In 1992, the PROLAA was asked to join a study of teacher preparation programs in Puerto Rico conducted by the Institute for Urban and Minority Education of Columbia University's Teachers College for the Puerto Rico General Council on Education. Our contribution was to prepare a profile of the teacher candidates examined in the Teacher Certification Tests based on the information collected from the student questionnaires regularly administered to the examinees. Also, the future teachers were compared by their performance based on PEAU admission tests and socioeconomic variables with the students entering other majors. This study required pairing the PEAU and the Teacher Certification data banks, which had information not available in any other place in Puerto Rico. The study was completed in 1993 with Antonio Magriñá, Manuel Maldonado Rivera, and Fransisco Rivera Batiz, from Columbia, as the principal investigators. This study was an example of the importance for research of our student data collection practices and the data banks maintained in our Office.

Sporadically, the Office conducted predictive validity studies for specific institutions. These were treated as confidential and were reported only to the institution and discussed with its pertinent officials to inform their admissions policies and practices. These institutional validity studies became less frequent during the late nineties because many institutions either did their own studies or gave less weight to the tests scores in their admissions practices. The University of Puerto Rico System, because it was the most selective institution, was the most frequent user of this service. The PROLAA had been advising the institution for several years to revise its admissions formula which gave two-thirds of the weight to the PAA and one-third to high school average. The validity studies showed

that even if the combination of high school grade point average and the tests scores produced the best prediction of success, the high school average was the better predictor of the two, so we felt that less weight should be given to the test. But for many years, the institution was reluctant to change its formula. It is interesting how difficult it is, even for academic people, to put aside their formed opinion. There was a traditional distrust of the school grades and an excessive faith in test scores.

But in 1994, President Dr. Norman Maldonado, and Academic Vice President Dr. Blanca Silvestrini, decided to revise the formula. The university was going to expand the number of admitted freshmen and wanted to achieve a better balance between those coming from the public schools and those coming from the private schools. As we know, the private school students, as a group, scored higher. Hence, a larger proportion of students from the private schools were admitted, while a smaller proportion were admitted from the public school applicants and, hence, from the lower socioeconomic groups. The PROLAA proposed a comprehensive and sophisticated predictive validity study using more variables that could explain success in the different system units and major programs, but the university decided to appoint an internal task force to study the question and come up with a new admissions formula to be used across all the units and programs and would not endanger the academic standards it was committed to maintain. We were asked to support this effort by providing data as well as some statistical analyses. By 1995-96, a new admissions formula was used: 50% for the high school grade point average and 50% for the PAA, with equal weight to Verbal and Mathematical Reasoning. Probably, this was the easier solution, but it was better than the excessive weight previously given to the PAA.

Some of the research conducted by the full-time and part-time professional staff and the external consultants was by its very nature and extent relevant for a more specialized audience than the brief research reports published in *Academia*. Thus in 1986, the PROLAA began the series *Hallazgos de la Investigación Psicométrica*, of which three or four were published the following years. But the staff was so busy working on the core programs and the new projects on that no others came out for several years. By 1997, there were some recently completed studies, and the decision was made to publish them in a new series with a less technical name: *Cuadernos de Investigación de la Oficina de Puerto Rico y América Latina* (literally: *Research Booklets of the PRLAO*). The series has continued and as of 2005, 12 studies have been published.

New alliances and projects to extend the mission. After 1987, the PROLAA became more proactive in establishing alliances with other organizations to advise, support, and help conduct educational projects to achieve shared objectives. It was a way of advancing the Board's mission and goals without having to invest large amounts of our own resources. Even if it meant having less control over a project, there was an advantage in extending the College Board's contribution to education, strengthening its image, and gaining good will in the community. Most of the alliances which we supported required in-kind contributions, such as providing, scoring, and reporting assessments, free or at a minimum cost, as well as staff time, logistical support, and technical advice. But some of the organizations were able to pay for part of the direct costs incurred by us. In several of these projects, the PROLAA had a very strong presence either in an advisory capacity or in a decision-making capacity, and in the actual work conducted.

During this period, the PROLAA joined several projects sponsored by other organizations. One of these was the CAUSA (Comprehensive Activities to Upgrade Science Academics) project, funded with a grant from the Carnegie Foundation and hosted by the Ana G. Méndez Educational Foundation, allied with the PRDoE and several mainland national laboratories and institutions. This project included professional development activities for elementary and secondary school teachers, summer institutes on the mainland, and a Saturday Academy in science, mathematics, and English for talented eighth-grade students in the public schools. The PROLAA's role was to provide the SIPOE tests to identify talented eighth-graders for the project and the PEAU tests to assess the students' progress and prepare special statistical analyses and reports. In addition, the executive director was a member of the project's advisory board. There were two other somewhat similar projects that the Office supported with special administrations of our assessments; statistical analyses and reports; and training sessions for counselors: EXITO, a program for dropout and at-risk students sponsored by the UPR Regional College System in conjunction with 11 municipalities across the island; and, CROEM, a senior-year residential program in science and mathematics operated by the Department of Education and the UPR-Mayaguez Campus.

In 1988, the PROLAA joined the University of Puerto Rico in cosponsoring a new educational conference focused on promoting the development of critical thinking skills in all levels of education: the *Encuentro Nacional de Educación y Pensamiento*. This event was the initiative of a group of college teachers and researchers from the UPR System and was led by Dr. Angel Villarini, a philosopher who was working on the theory and methodology of teaching reasoning

and critical thinking skills. It was only natural that the group would seek the support of the College Board since we were the sponsors of several assessments of reasoning abilities. The conference became an annual event that triggered an influential movement espousing a critical pedagogy and inspired teachers and academics of all levels to transform their teaching practice. It focused on the development of reflective, critical, and creative thought, and on social and ethical responsibility. Soon, the annual meeting was the largest educational event in Puerto Rico, and in 2000 it became an international conference with participants from Europe, the United States, and Latin America. Until my retirement, the PROLAA provided substantial logistical and economic support for this event, as well as staff time to serve on the organizing committee.

There were also alliances with other College Board offices and mainland institutions. In 1993 at the request of Brian Petraitis, director of the College Board's Albany Office, the PROLAA joined in sponsoring a most interesting initiative bringing together legislators and educators from New York and Puerto Rico. The New York/Puerto Rico Education Summit met for three years on the island, and the PROLAA hosted and coordinated the local activities, which included meetings and workshops with local legislators and educators. This summit was an opportunity to discuss the educational problems faced by Puerto Ricans in New York State and to explore collaboration between the two jurisdictions. At about the same time, we joined with the Middle States Regional Office and the Caribbean Counselors Association to support a summer institute for admissions to colleges on the mainland United States attended by 50 counselors from Puerto Rico and the Virgin Islands. And for several years, we coordinated local workshops for Project 1000, sponsored by the State University of Arizona to increase the number of Hispanics entering and succeeding in graduate studies.

But unquestionably, the most important alliance of these years was the *Alianza Metropolitana para la Reforma Educativa* (Metropolitan Alliance for Education Reform), an initiative of the University of the Sacred Heart funded for over six years by the Ford Foundation. The University hosted the Alliance and provided administrative support as well as resources from its education department. The PROLAA joined the initial Alliance project in 1994, which was aimed at improving the achievement levels and increasing the retention rate in five intermediate secondary schools serving close to 800 low-income students in San Juan. In addition to the University and the College Board, there were three other members: ASPIRA, the Puerto Rico Community Foundation, and the PRDoE. Each organization brought a particular expertise to the project. ASPIRA had been working with dropouts and promoting parental involvement. The Foundation had an ongoing project to strengthen education in grades 7 to 9, focusing on the arts and affective development. Our role was to strengthen counseling by using SIPOE to gather information on students and working with school counselors and teachers to use it effectively with other information available at the school. The Department selected the schools, gave its blessing to the project, and promised to keep its bureaucracy under control when necessary. The Alliance was governed by a board on which each member had a seat.

During 1997-98, the Ford Foundation, pleased with the success of the five schools, suggested that the Alliance submit a proposal for a broader project designed to impact a whole school district. It was to be an all-out collaborative effort to stimulate students to stay in school, reach higher achievement levels, make adequate academic progress, finish high school, and go on to college or postsecondary studies. In what was probably an exercise in utopian thinking, the Alliance selected the Cataño School District for the project. This district presented all the typical problems related to urban poverty. Achievement levels were low, absenteeism was high, teacher turnover frequent, retention at the intermediate level was low, and few of the high school graduates went on to college. It was a small district, serving 4,800 students in six elementary, two intermediate, one high school, and two special schools, but the latter did not participate in the project. There were one or two bright spots, particularly one good elementary school with a principal who was to become a model for others.

The Alliance developed a comprehensive intervention approach to impact simultaneously the school's vision of itself, the management styles, the teachers and counselors, the curriculum and the learning environment, the students, and the parents. Workshops to develop school mission statements were held with principals, teachers, counselors, and parents, and after the mission was defined, frequent follow-up meetings were conducted with the same group. Workshops with parents to develop their leadership skills and integrate them to the school community were another dimension of this project. A good number of the district's teachers completed a master's degree at Sacred Heart, and all received professional development training. A major curricular innovation, introduced later, was a special weekly seminar for students focused on open discussions to integrate learning from the traditional courses.

The reform project was based on an integrated approach that demanded much time from all participants. Janning Estrada, as the PROLAA representative in the program committee, had to participate in all its meetings and then in

most of the workshops. Under her supervision, consultant Lina Giusti worked directly with the school counselors, implementing a guidance model that integrated the newly developed academic and occupational planning system (later CEPA) with the PIENSE I/II and the PEAU tests. The executive director, as a member of the Alliance Board, attended all its meetings, traveled to the mainland to meet with Ford staff and visit similar programs, and was also expected to participate in many of the project activities.

In many ways, this project became a laboratory for us to try out our guidance instruments and develop complementary activities and materials to support students in their transition from elementary to secondary education, and from high school to higher education. Among these, two should be mentioned: one was the student workbooks written by consultant Lina Giusti to stimulate students to continue their vocational exploration and support their academic planning; the other was a course to strengthen verbal and mathematical reasoning abilities designed and taught by Professors Irma Nydia Vázquez (UPR-Carolina Campus), and María Maldonado (UPR-Bayamón Campus) also consultants to the PROLAA. This course was offered in 10 Saturday sessions at the district high school as part of a drive to get more students to take the admissions tests and apply to college. It became one of the most successful project activities and a major factor in increasing the number of students going on to college.

It is difficult to evaluate the results of this project. The district and its community had too many problems that were beyond the Alliance's reach. Possibly, six years were not enough to make a dramatic and lasting impact. Overall academic achievement was much less than spectacular, although many students did show gains. But even so, there were important indicators of positive change, more so in the elementary and intermediate schools than in the high school. More parents were involved in their children's education and active in supporting their schools; principals, teachers and counselors had learned to use information from assessments and guidance instruments to support their students; and more students found out that college and other postsecondary studies were within their reach. When the school and community participants evaluated their experience, it was generally very positive. During the project's last two years, attempts to transfer its approach and some of its activities to other school districts were made. The Department of Education initially supported these attempts, but as the Ford grant dried up and a new administration did not provide the required financial and administrative support, the Alliance and its project faded away by 2004.

E. Ups and Downs with the Department of Education

In January 1993, a new government took over in Puerto Rico. For eight years, the relationship between the College Board and the Department of Puerto Rico was like riding a rollercoaster. In 1993-94, the External Assessment System of Academic Achievement was discontinued before it became fully operational. There were two reasons for this decision. The new government was pushing a drastic education reform based on making each school an autonomous entity and almost eliminating the role of the school district. Much of the information and analyses that the External Assessment System would provide was at the district level. The other reason was economic. The Federal Department of Education had told the PRDoE that it needed to have new Title I tests or risk losing federal funding. Secretary Torres felt that the Department could not support two testing systems and suggested that the College Board could easily develop the new tests because we had a large item bank.

In the summer of 1994, our proposal to develop the new tests was accepted by new Secretary Víctor Fajardo, and due to the traditional Department's slow pace, it was not until October that we could begin, two months later than the agreed upon date. Regardless, we began preparing the new tests in Spanish, Mathematics, and English for all students from first to ninth grade that received Title I support. We called the tests SENDA, for *Sistema de Evaluación Normativa del Aprovechamiento Académico*, which in English means, *Norm-referenced achievement evaluation system*. The tests were pretested in record time and administered in May to approximately 515,000 students. Scoring was conducted in June, and the pertinent statistical analyses during the following two months. Reporting was scheduled to begin in August and be completed in September, but we had some delays and did not finish them until October. We needed the original two months lost before the contract was signed. The next thing we knew, the Department informed us that they would look for another provider because they preferred to have criterion-referenced tests.

For several years after the discontinuation of SENDA, relations with Secretary Fajardo were ambivalent. We were not able to reinstate SIPOE, and we had to force his hand to solve the Teacher Certification deficit. On the other hand, the Advanced Level Special Project was fully funded and expanded. Ironically, near the end of Secretary Fajardo's tenure, he called on us to take over the Title I tests because the Federal Department of Education was not happy with them. We politely refused to even talk about the possibility.

F. Beyond Year 2000: A Second Strategic Plan: 1998-99 to 2002-03.

Impact of the first five-year plan and the need for a second. As the twentieth century came to an end, the PROLAA engaged in another round of intensive strategic thinking. The first five-year plan had provided a good framework for almost six years. The five broad goals established in 1992-93 were largely achieved, some of them better than expected. The long history of deficit operation was reversed. The goal of achieving a 6% net margin by the end of the five-year period was not only met but actually doubled. And the PROLAA was able to finance an extensive research and development plan to revise the core programs without requesting any monies from the national College Board R&D funds. All of the core programs were revised and updated. The Guidance program was transformed into a new and better product. A unique Advanced Level project was contracted with the PRDoE that substantially expanded the program in the public schools. The College Board increased its presence in the Commonwealth, forming new alliances with other organizations, improving communication and interaction with the different sectors of the education community, and participating in important projects to improve achievement of underprivileged students in the public schools. The PAA was making a strong comeback in Mexico, and we had introduced PIENSE II, which immediately reached a level of use far surpassing its use in Puerto Rico. Modernization of the information technology unit had made progress, with the installation of new hardware and software. New opportunities were being explored for our programs in Mexico and other Latin countries.

On the other hand, there were some specific objectives of the Plan which were not achieved. Evidently we did not improve our capacity to get new users and retain old ones in the private schools. PIENSE and SIPOE actually lost some ground, and Advanced Level did not grow as expected. Relations with the Department of Education were unstable and somewhat erratic, due largely to the frequent changes in Secretaries and policies. The External Assessment project was discontinued and instead we were asked to do SENDA, only to lose it later to another provider. We were not able to restore the SIPOE contract during this period or to get the subsidy for the Teacher Certification Tests. We needed to better understand our environment and find out what was not working and how we could strengthen our position. In other words, we were ready for another serious planning effort to take us into the twenty-first century.

This time we decided to get expert help and contracted two consulting firms to conduct image and market studies in Puerto Rico and Mexico, respectively. As we have said before, the first five-year plan marked a change in attitude toward using business concepts and analytical tools to strengthen our operation and advance our educational mission. For this second planning effort, we had no second thoughts about doing it. The Puerto Rico study was conducted by the San Juan group *Estudios Técnicos de Puerto Rico, Inc.*, and the Mexican study by *Centro de Estudios de Opinión Pública*, located in Mexico City. Both studies were conducted during 1997 and 1998 and used somewhat similar methodologies to explore with active and potential users of our programs their perceptions concerning our strengths and weaknesses as providers of educational assessments and services. Both studies also examined the market potential for our programs and identified the major opportunities open to us. The Mexican study concentrated its market analyses in the higher education segment, both public and private, but limited the analysis of the K-12 school segment to the private schools in Mexico City.

Findings of the image and market studies. The local study did not produce any surprises concerning the College Board's image in Puerto Rico, which continued to be highly positive, but it confirmed some of our deepest worries and stimulated us to rethink the Office from a different perspective. Through focus groups and questionnaires conducted with different sectors of the education community, the consultants concluded that the College Board had a very positive image among the educational leaders who saw the Board as a prestigious, reliable, serious and technically capable organization that had contributed substantially to education in Puerto Rico. Although this positive image was present in all sectors, there were negative perceptions among people closer to the individual school level. Many felt that the Office should be more in touch with the schools, promote its products better, and be more proactive in solving educational problems. The public schools were satisfied with the services but wanted more accessibility and better communication, expecting the PROLAA to be closer to them, providing more support for their needs. On the other hand, the private schools took a more critical view, believing our programs, especially SIPOE, more oriented to needs of the public schools. They were unhappy with the registration process for all our programs, with the long wait for the PIENSE reports, and they wanted the reports to provide more useful information for the teachers to work with specific deficiencies. High school seniors and college freshmen complained about waiting a long time for score reports and expressed great dissatisfaction with counselors, calling on the College Board to provide more information useful for career planning and more training for high school counselors.

Regarding market potential in Puerto Rico, consultants cautioned that the college-going population would not grow any more and this would affect the PEAU admissions tests volume. The PROLAA should explore providing admissions and placement services to a different postsecondary education market that was growing: technical institutes and schools offering short-term programs preparing students for entering directly the world of work. The private school market would continue to grow as middle class parents became less satisfied with the public schools. Advanced Level had a high potential in this sector because the private schools would want to offer this program as part of their own marketing strategy. But to increase the PIENSE share in this market required new approaches and solving existing service problems because the private schools demanded faster and more personal service. Even though the private schools recognized the higher psychometric quality of the College Board's assessments, they would prefer other vendors who delivered the score reports in less time and also provided direct support to improve teaching. The public school market was always there, but it responded to changing policies established at the central system level by new Secretaries, and this made it an uncertain market. But the Federal Department of Education and the local legislature were calling for more accountability. The College Board's tradition of service and its standing as the makers of the college admissions tests was a strategic advantage in obtaining system-wide assessment contracts that would probably remain to be centrally decided. And, at least in theory, individual schools could use their newly granted autonomy to buy other assessments and guidance services, which could open up opportunities for the PROLAA programs.

The Mexico study found a similar positive image among existing customers and a market with many opportunities as well as some dangers. Users of our programs were generally pleased with our services. The program users recognized the quality of our tests, praised the controls established for their secure and uniform administration, and were satisfied with the support and information provided by the PROLAA to their institutions and schools, including the visits made by our staff. The fact that the Puerto Rico Office was a part of the College Board was also viewed positively by most. On the other hand, Mexican program users would prefer that the PROLAA had an agent in Mexico instead of having to call or fax Puerto Rico. Some participants also expressed that being a foreign organization could hinder future growth because of the higher costs of the tests in dollars and the difficulties of international shipping. Also, the recent creation and progress made by CENEVAL, a Mexican organization offering testing services and indirectly supported by the government was definitely a threat. It was necessary to protect the market share we were serving and to have a strategy to increase it. Recognition of the College Board was, of course, much less evidenced among nonusers, particularly in the huge private school sector in Mexico City.

The market for admissions tests in public and private higher education could be expected to grow by approximately 20,000 to 25,000 annually for the following five years, probably increasing after 2000. The number of students applying to the preparatory schools administered by universities was also expected to grow, close to 40,000 to 50,000 annually. CENEVAL was a strong competitor, being well positioned in the public sector. The study identified three other markets where the PROLAA could provide assessments and services: English language, teacher evaluation, and private secondary schools (grades 7 to 9). Partly in response to the signing of the North America Free Trade Agreement, more higher education institutions were establishing English language requirements for admissions and/or graduation. The number of courses taken and grades obtained were not considered to be reliable indicators so external independent tests were preferred. Some institutions were using the TOEFL for this purpose, but there was space for another test designed to support the teaching and learning of English at different levels of performance such as our ELASH, which was being developed. Evaluating teachers both at the time of recruitment and inservice was a growing interest in the private school sector. The consultants advised us to consider adapting and promoting the teacher certification tests used in Puerto Rico.

The private K-12 school market was large and expected to continue growing. The concentration of these schools in the Mexico metropolitan area alone accounted for close to one thousand schools with about half a million students. The schools need assessment and guidance products such as PIENSE and the occupational/academic planning system in order to evaluate their students' achievement and strengthen their opportunities to move into the better higher education institutions. This was in turn the best "marketing" they could use to attract students in what was becoming a very competitive environment. If the PROLAA adapted these programs to the Mexican educational environment and promoted them efficiently, they had good potential for growth.

Finally, the study advised that to expand our services in Mexico, particularly in the private sector, we should consider establishing an office there or appointing more local agents to visit prospective institutions and provide more personal attention to the existing customers. The fact that some well-known public and private institutions were using the PAA and PIENSE should be a major element of an effective marketing strategy.

In conclusion, the two studies confirmed that the College Board's PROLAA had a strong image and that there were good opportunities to extend its programs and services in Puerto Rico and Mexico. But they also confirmed that there was a different environment that required new approaches to turn these opportunities into real expansion of our services to schools in both countries. Estudios Técnicos strongly advised that the Office was product-oriented but should become market or client oriented. Both studies stressed the need to improve marketing and customer service, two areas where the PROLAA had not assigned adequate resources in the past because its initial and most important programs had captive audiences and faced no competition. As we faced these findings and recommendations, we realized that it was not just a question of assigning resources to these two areas. A more profound change was needed: the staff, all the staff, had to internalize a new vision of what the PROLAA could achieve, and it was necessary to develop new values and attitudes concerning the Office's operations. Strictly speaking it would not be a radical change in orientation because the first five-year plan had already been a step in the right direction, but it would require setting up new priorities and a thorough reorganization of the Office.⁴⁰

Priorities and Goals of the Second Plan

As we began designing the plan, we could not forget that we were a College Board office and we had to comply with the Board's major goals and planning directives designed for an environment quite different from ours. It required a good dose of creative imagination on our part and the continuous generous understanding of our senior supervisors in order to have a good fit between the local and the national plans. Within this context, the Second Plan reaffirmed the uniqueness of the PRLAO as a College Board office whose mission was:

Addressing the needs of educational institutions and students in Spanish-speaking communities in the Commonwealth of Puerto Rico, Latin America, and when appropriate, in the mainland United States. Thus, our programs and activities aim at supporting the extension of educational opportunities and facilitating transition to higher education for Spanish-speaking students in the Americas.

This mission served as the base for a new vision statement that identified where we wanted to be at the end of the five-year period: a recognized leader in promoting excellence; a consensus builder and a major partner in education in Puerto Rico; an important nonprofit provider of assessment and guidance products for transition to college in the Spanish-speaking Americas; an efficient and dependable source of reliable, valid, and relevant educational information, using technology, at reasonable cost; and, as an efficiently managed, modern operation, financially healthy with a committed and proud staff. The mission and vision statements and the findings of the image and market studies gave us the philosophical and empirical basis for the new plan. The essence of the Second Plan consisted of five strategic priorities of equal importance and 10 general goals closely related to them.⁴¹

One priority evidently had to be strengthening marketing and developing a client-service orientation. This implied moving from a promotion strategy based on the intrinsic educational value of the programs for all audiences to a more systematic marketing strategy targeting specific audiences and stressing how the programs could support the school or institution's educational goals and respond to their educational needs. The traditional attitude that the psychometric superiority of our assessments was sufficient to attract new users was no longer effective. Quality would always remain a major factor in the equation, but it was necessary to understand the customer's situation and explain how our programs and services would help them improve their students' progress. And once the school or institution began using a given program, it was necessary to provide feedback and assistance in understanding the reports and in planning follow-up activities. Cost-efficient ways had to be found to serve the customers better without having a large cadre of staff continually on the road.

A second priority was to reorganize the Office by creating new units and redefining old ones so that some staff and budget could be deployed to promote expansion of our programs, pay closer attention to customers' needs, strengthen communications with all the constituencies, and professionalize marketing. We also needed the flexibility to create alliances, partnerships, and new business relationships with other institutions and organizations to achieve

40. It is interesting that these findings were similar in many ways to the situation on the mainland College Board operations. As reported by Fred Dietrich and Gretchen Rigol in an Advisory Council meeting, studies had found the need to improve communications, to improve service, to establish links, and to conduct more aggressive marketing.

41. The College Board, Puerto Rico Office and Latin American Activities, Second Five-Year Strategic Plan: 1998-99 to 2002-03, 18 pages.

common goals and a more efficient use of resources. It was necessary to complete the decentralization of authority initiated in the 1992-93 Plan and delegate more autonomy to the middle-level managers, raising their status and rank, and giving them full control over the day-to-day operations. Planning, budget preparation, and monitoring outcomes to ensure achievement of the goals and objectives would be a shared responsibility of the division managers directly under the leadership of the executive director.

Strengthening our presence in Mexico and exploring opportunities to extend our services to selected Latin American countries was a third priority. We decided that the best course of action was to create a new unit to focus on expanding our services in Mexico and other countries and providing improved customer service. This unit would have its own staff and budget, and it would be led by a director of Latin American Operations reporting directly to the executive director, and sharing responsibility for the region with him. In addition to PAA and PIENSE, two new programs were under development: CEPA and ELASH. The first one was expected to find a niche in Puerto Rico and Mexico, and the second one was designed especially for Latin America.

A fourth priority was strengthening our capacity and knowledge to efficiently produce and process educationally relevant information generated by our assessments. This implied moving ahead to complete the technological infrastructure, knowledge base, and competencies necessary for supporting the Office's mission, programs, and activities in an era when information technology will play a decisive role in education. It was necessary to continue improving a technology base to produce more, better, and faster information for our customers and the educational community; to develop better data and analyses to support strategic management and planning; and to begin experimenting with computer-delivered and adaptive testing for the future.

Continuing to strengthen test development and research activities to maintain our assessments up to date and develop new programs and services was our fifth strategic priority. Education worldwide was in a state of flux, new needs were being perceived, and users of educational services were becoming more sophisticated and demanding. In addition to maintaining and improving the quality of our programs through continuous research, it was necessary to develop new services to support the users of the programs in their search for educational excellence, establishing outreach and collaboration programs with schools, universities and other educational organizations.

It is not relevant to explain in detail the Second Five-Year Plan. It suffices to say that guided by the five strategic priorities described above, a complete plan with 10 measurable goals, specific strategies to achieve them, and fiscal projections was prepared and approved by the Advisory Council and the New York senior management in 1999.

Reconceptualization of the Office

For obvious reasons, the reorganization of the Office was critical for the success of the Second Plan. Really, it was much more than what the word “reorganization” suggests. Perhaps “reengineering” or “reconceptualization” would be more appropriate to describe the changes implemented in stages from 1999 to 2001. We should remember that at its founding, the PRO was organized to support one major function in Puerto Rico: developing and administering the PAA and ESLAT. One Director supervised all work related to this major function under an executive director who handled relations with the Puerto Rican educational leadership and was also responsible for work in Latin America. Gradually, as new programs were developed and the functions originally performed by ETS were transferred to Puerto Rico, three distinct units emerged, each responsible for a number of related functions: Program Management and Administrative Services; Test Development and Research; and Test Administration, Production, and Publications. These three units were also the cost centers in the budget process. Later, a smaller unit emerged for data processing that was transformed into the Division of New Initiatives and Information Technology in 1992-93 with the first five-year plan.

In spite of these additions, the Office structure had remained essentially the same, focused on the development and administration of tests. To the extent that the structure and budget signal priorities, it was evident that markets, customer service and providing educational support were not highlighted. It was becoming obsolete, as we could no longer depend on an ever-growing captive market of admissions tests, and we needed to assign resources to expand our services in the face of increasing competition in Puerto Rico and Latin America.

The new structure emerged in stages from 1999 to 2003. We had three different markets or service areas that were also our three revenue sources. Each of these presented its peculiar needs, expectations, and problems, and as such required specialized attention. These were first: schools and institutions in Mexico and Latin America; second: independent schools and institutions, and their students in Puerto Rico; and third: a market for providing tests and other services under contract to the public school system or a part thereof, and to other organizations and institutions. In order to provide the special attention and resources needed to strengthen our presence and provide better service in these three markets, we revamped the traditional divisions. First, a new Latin America Division was established with four major responsibilities: planning and managing the expansion of our programs and services in the region in collaboration with the executive director; coordinating with other divisions and units all the logistics of the Latin American operations and supervising the institutional administrations; conducting marketing and customer support activities and supervising the work of consultants under contract for these activities; and organizing the Latin American Conference. Janning Estrada was appointed Director of Latin American Operations but retained her responsibilities of managing several special projects closely related to her former functions in the test development division.

Later, in 2003, the reorganization was completed when the Test Administration, Production, and Publications Division was divided into two separate units: Educational Services and Test Administration; and Publications and Distribution. The first of these would focus on the schools, institutions, and students that we served in Puerto Rico. Its functions were to coordinate all the logistics, procedures, and training activities necessary for the secure and efficient administration of all tests and the Guidance Inventory in Puerto Rico, as well as coordinating marketing and customer support activities for private schools. A marketing specialist, initially located in the executive director's office, was transferred to this division, reporting to a newly appointed Director of Puerto Rico Operations and Educational Services, José Barceló.

The third market, the contracts with the Department for systemwide testing and with institutions seeking special services, was assigned to the Management unit. The executive director was responsible for promoting and negotiating contracts and coordinating the logistics with the corresponding operational units.

The Test Development and Research Division, directed by Antonio Magriñá, was a strictly technical unit responsible for developing tests and conducting all the psychometric analyses, providing technical assistance, conducting research, and preparing technical reports and publications for the three markets served by the Office. It was no longer expected to be responsible for promoting programs or providing direct customer support, although its staff would frequently support the Latin America and the Puerto Rico operations providing technical expertise as needed. In 2003, its staff was expanded by adding two former part-time consultants as full-time assistant directors. Dr. María Maldonado was appointed as the Mathematics specialist and coordinator of the changes to the PAA and Achievement

tests. Dr. Luz Maritza Fernández was appointed to manage the Advanced Level Program and support Teacher Certification which was directed by Dr. María Elena Vargas.

A new division named Publications and Distribution, directed by Miguel Cintrón was responsible for the graphic design, printing, and distribution of all tests, administrative materials, as well as all informative, promotional, and technical publications needed for the three markets. In 2002, a new warehouse and distribution center was inaugurated under the direction of José Oyola.

The Division of Information Technology, under Luis Rivera, was responsible for all data processing related to the testing programs in Puerto Rico and Latin America, such as registration and test room assignments; scanning and scoring tests; producing individual and group scores; maintaining the internal LAN and electronic communications with the NYO; developing new applications and supporting all user applications and coordinating training; providing data and information for strategic management; and producing the BUSCA reports. All these functions were to be performed in close collaboration with the other divisions.

In 2001, the Division of Program Management and Administrative Services, which comprised the executive director, his assistants, the office manager and her staff, was also revamped. Administrative Services became an autonomous unit, ably directed by Norma González, to manage all the support services needed for the efficient functioning of the Office, such as telephone service, mailing, purchases, accounts payable, and customer billing; also, implementing the College Board staff manual of procedures and ensuring compliance with local laws and regulations; and coordinating staff development activities and the staff retreat. Finally, this unit would work closely with the executive director and the division managers in the preparation of the office plan and budget. As was to be expected, many of these functions had to be closely coordinated with the corresponding College Board offices in New York.

As the new structure took its final form, the role of the executive director was also better defined in terms of leading the continuing strategic planning process and the successful implementation of the second five-year plan. The tasks and functions related to the efficient functioning of the Office were transferred to Administrative Services. The executive director represented the College Board for the different constituencies and organizations served in Puerto Rico and Latin America. He led the annual planning and budgeting process, supervised six divisional managers, and worked closely with the strategic management group to monitor progress, identify difficulties, and redirect efforts when necessary. He also recommended to NYO candidates for the Advisory Council, and prepared the group's agenda in consultation with the council's chair. He coordinated the preparation of proposals for providing services under external grants and contracts, negotiated these, and monitored their implementation. He played a major role in the expansion of services in Latin America and thus traveled frequently and extensively in the region. This required establishing a system of monthly meetings with the division managers to review their work and often to settle differences among them, and three coordinating groups: one for technical issues, the second for Latin America, and the third for marketing and customer service.

Finally, the reorganization process prompted us to change the name of the Office with the idea of giving higher visibility to Latin America. We had added "Latin American Activities" in 1989 and now we changed it from "Puerto Rico Office and Latin American Activities," to "Puerto Rico and Latin America Office." Hereinafter in this section we will refer to the Office as PRLAO.

A New President for the College Board. At about the same time that we began the implementation of the Second Five-Year Plan, the College Board inaugurated, on July 1, 1999, a new president: Gaston Caperton. During his tenure as governor of West Virginia, President Caperton had led his state to achieve substantial progress in education. Upon completion of his second term, he was invited, first by Harvard and then by Columbia Teachers College, to share his views and practical experience in formulating state educational policies and establishing the political consensus to implement them successfully. In January 2000, President Caperton visited the PRLAO for the first time, meeting with the staff and the Advisory Panel. He explained his priorities for the future of the College Board around four major ideas: To integrate existing and new products into a powerful College Board System to support academic excellence and equity in education; to strengthen the College Board Association; to expand the Board's presence on the Internet; and to establish a clear College Board identity in the educational community and the general public. We took the opportunity to briefly explain the past accomplishments of the College Board in Puerto Rico and Latin America, and our strategic priorities and goals for the following five years. He was quite impressed with what the Office had accomplished and our vision for the future. At the end we all felt that a very positive empathy had been established between the PRLAO and the new president. This feeling was strengthened when he saw the many college presidents and education leaders that responded to our invitation to meet him at an evening reception in his honor.

In 2002, under President Caperton's leadership, the College Board made important changes in its structure. Fred Dietrich, senior vice president and chief of operations, presented the restructuring to the Advisory Panel in August when it was already being implemented. Caperton's aim was to transform "a good organization into a great one." In order to achieve this status, the Board had to become a customer-centered organization, improving services by being as effective, efficient, and responsive as possible; and it had to increase the number of students, schools, districts, and colleges it served, with an emphasis on reaching out to underserved and underrepresented students. Two new divisions were created to concentrate on two major service areas: K-12 and Higher Education, each with a coordinated set of integrated products to be offered as a sequence or package. For this vision to become reality, it was critical to strengthen the service function, to centralize customer service, and to develop a professional sales force. Finally, planning and technology had to be closely integrated.

The new structure and the ideas supporting it had been discussed since 2001-02 on meetings on the mainland so I was aware of the coming changes. At the PRLAO we were pleased that the new goals, priorities, and the creation of divisions focusing on service areas were in the same general direction as the changes that the PRLAO was implementing in our Second Five-Year Strategic Plan since 1998-99. A source of particular pride for us was the idea of integrating and offering products as a sequence or package, something that the PRLAO was doing in Puerto Rico and Mexico since 1997.

A three-year plan for Information Technology. The First Five-Year Plan included a subsidiary plan to modernize the computer center operations. This plan was coordinated by Ed Jacobson from NYO and required substantial investment from the College Board technology budget during the 1990s. Initially, it entailed moving away from a WANG mainframe-terminal workstation structure to a stand-alone PC and LAN-based structure. But in successive years, there was frequent updating to more powerful and efficient PCs, Microsoft Windows was installed in every computer and all staff members were trained in Windows; the WANG mainframe was retired; a new Compaq server was installed to activate a local net; a new Novell server was installed; more powerful PCs and training were implemented; and a new telephone system with voice mail was installed. The Computer Center was remodeled to make space for additional staff and to have a more professional look. These changes were very positive. Communications and support staff working conditions improved substantially, professionals were now able to do more things on their desktops, and the Computer Center was able to process more work.

But in spite of these changes, the general perception at the PRLAO was that IT needed a more substantial transformation. In 2003-04, we requested support from the Board's Corporate Systems Division for preparing a three-year plan to restructure the unit. Mr. Greg Parks was assigned to work with us in developing the plan. Mr. Parks visited the Office and held intense meetings with staff in each unit and discussed his findings with the Office management team. Several weeks later, Greg submitted a detailed three-year plan and budget which satisfied our expectations. It called for restructuring IT into two departments, Operations and Software Engineering, and to organize these into teams. At least seven additional staff would be recruited in stages, and existing staff members would go through intensive training so they could assume new roles. A new IT director with the experience and knowledge to manage a modern IT Division had to be recruited. At my insistence, the plan included that Corporate Systems assign one of its specialists part-time to oversee the implementation of the plan and to maintain regular communication between the Corporate System and the PRLAO IT.

The proposed restructuring was expected to increase the unit's capacity to support the PRLAO's programs and their markets efficiently as these were demanding all sorts of more organized and complex information. One major problem was that data for each test administration from each program were stored isolated from the rest and required much programming to cross-integrate or to prepare historical reports by institutions, or to find information about the same student in different programs. The solution was to design a unified data warehouse and migrate into it all the isolated data. This became the highest priority for the restructured IT. There was a lot of discussion about Web-based registration. When Mr. Parks saw the number of admissions tests administered in Latin America, he thought that registration through the Internet was urgently needed. When we explained that all these students were tested in institutional administrations and did not register with us but with the institutions, he realized that it was not that urgent. However, in Puerto Rico we did have direct student registration and students, particularly those from private schools, were questioning when we would have registration through the Internet as the College Board mainland did. So it was decided to add this application as a second priority together with a scoring application. The restructuring process began early in 2005 when a new director, Mr. Antonio Santos, was appointed.

G. New Initiatives in Assessments and Services (1997–2005).

English Language Assessment System for Hispanics.

One of the most important developments during the late nineties was the English Language Assessment System for Hispanics (ELASH), developed originally to support English language teaching and learning in Latin America. As we know, when the PRO began developing a Spanish version of the SAT, the local colleges requested that a test to measure English language achievement also be developed. Thus, the English as a Second Language Test (ESLAT) was administered at the first PAA administration in 1964 and has remained a part of the required admissions tests package until this day. ESLAT was designed for Puerto Rico, where instruction in English was required from K to 12 and in college for all students. This universal requirement provided an adequate base for a relatively short test to assess reading and grammar achievement and support adequate placement in the college freshman English course. ESLAT was used experimentally in one or two Latin American institutions and by two organizations as a screening test for students from the regions who were applying to scholarship programs in the United States. But it soon became evident that the overall situation of English instruction in the region required a different test. This was further confirmed when PIENSE I and II batteries, which included English tests, were used in Mexico. The tests were too difficult for many students, except for those in private schools with a strong English instruction program.

Generally speaking, in the sixties and seventies, good English instruction in Mexico and other Latin American countries with which we were familiar, was available mostly in the better private schools and in the “American schools.” In higher education, the situation was not much different. In the public institutions, foreign language requirements were generally nonexistent, and language courses were not part of the academic programs, except for students specializing in them. Other students had to seek language instruction in independent “language schools” mostly outside the university as such, which were open to anyone. The private institutions were better off: several had established English language requirements in specific programs, and a few went as far as to require a 500 score in the TOEFL for graduation in all programs.

In the eighties, instruction in English in the schools expanded rapidly as Ministries of Education, business leaders, and the universities realized that English had become indispensable for business, science, and technology. Most national education plans introduced some English instruction in the secondary and/or high school. In Mexico, this gained urgency when the North American Foreign Trade Agreement (NAFTA) was signed in 1994. In the public sector, a few States developed programs to strengthen the teaching of English beginning as early as the elementary school. The *preparatorias* run by the state universities developed their own programs. The majority of private schools proclaimed the teaching of English as one of their major educational goals. Many began offering well-structured English language programs developed in England, Canada, and in the United States. Some of these were comprehensive programs that provided textbooks, teacher training, and assessments. And the for-profit language “schools” continued to grow, each claiming to give you the best command of the English language your money could buy. With some variations this “explosion” in the teaching of English was present in many other Latin American countries. But it was hindered by many difficulties, particularly in the public schools. The most important of these difficulties was an inadequate supply of professionally trained English teachers. Often, people trained in other professions were teaching English simply because they had lived in the United States or studied there. Add to this that there were not good modern language teaching textbooks, or audiovisual materials. As was to be expected, all this instruction in the English language was producing a wide diversity of achievement levels that could not be reliably judged on the basis of courses taken or grades obtained.

In this context, reliable external assessments of English language performance became important. The market study had told us that there was a good opportunity for a new test of English, and the many conversations held with educational leaders and teachers in the region had given us insight into what kind of test would best serve the educational needs of students, schools, and universities. It was during a visit to Guatemala late in 1997, after seeing dozens of road signs advertising English instruction, and discussing this fact with several local educators, that I realized it was time to move and develop a new test of English. Upon returning to San Juan, I discussed the idea with Janning Estrada, Dr. Ylda Farré, our consultant for English language tests, and with Antonio Magriñá, our psychometrician. I knew that there could be some resistance in NYO because of the traditional College Board relation with TOEFL, so it was important to design a different type of test, one whose major purpose **was not** to certify whether the student had sufficient command of the language to attend college in the United States. We established

other parameters for the test. The most important was that it would be designed for testing English proficiency attained by persons whose first language was Spanish. Throughout the test, all instruction would be in Spanish. This would not only further distinguish the test from the TOEFL, but it would also keep us true to the best testing practice, as the examinee would understand exactly what he had to do in every test section. This decision also meant that the positive and negative interference between the two languages in areas such as word order and cognates could be assessed. It was also important that the new test had sufficient range to account for different levels of proficiency within a defined continuum of language development, and that reporting had to go beyond a score in a standardized scale. The test should not be aligned with any specific teaching program, textbooks, grade level or years of instruction. And finally, I insisted that it had to be an affordable test so that public schools and institutions in Latin America could use it.

Soon after, a task force was formed to develop the test. Due to her knowledge of the Latin American market and her experience in test development, Janning Estrada was appointed project manager; Ylda Farre was in charge of designing the test content and structure, and coordinating item writing; Magriñá conducted all the statistical research; and Woody Woodford from ETS was our expert consultant for the listening part. My role was to explain and obtain approval for the project in NYO, to assign the needed budget resources, and to summon the cooperation of the other units and staff, as we were on a fast track to have the test available by the summer of 1999.

Sometime during the development process, a name for the test was found: English Language Assessment System for Hispanics (ELASH). We called it a system rather than a test because soon after development began, we realized that a single test would not do the job well. It would be too long, requiring more than two typical class periods, and it would not meet the affordability criteria. Experimental testing was conducted between March and May 1999, with more than 8,000 students from 53 schools and colleges in Puerto Rico and Mexico. The students ranged from grade 5 to college freshmen.

The system developed consisted of two 90-minute tests with three parts each. ELASH I assessed listening comprehension (Part 1), language and indirect writing (Part 2), and reading and vocabulary (Part 3), and focused on novice and low intermediate proficiency. ELASH II also had three parts, assessing the same language areas except that Part 3 substituted idiomatic expressions instead of vocabulary, and it focused on high intermediate and advanced proficiency. The teacher decided which of the two tests the student would take, based on the information he had about the student's experience with English and the information we provided about the test content specifications. Each test, although focused on two proficiency levels, provided information on the other two but with less precision. So that if a student took ELASH I and was beyond the low intermediate level, the test would register it and the school would be advised to test the student with ELASH II to place him accurately on either of the two higher levels. The same was true if the student was given ELASH II and was really below high intermediate proficiency. The listening part required a portable cassette machine such as were typically used for language instruction in the schools. This part was common to both tests, which made it possible to simultaneously test two groups with ELASH I and II, respectively, in the same room.

The essence of the assessment was the proficiency descriptors continuum defined for the three language areas assessed. A matrix of performance statements was developed describing what the student could do, in different contexts and text types and length, in each of the three areas. These statements were classified into four proficiency levels, from novice to advanced with score ranges and cutting points statistically established for each level in each language area. The student score report included a total score obtained on a scale ranging from 40 to 200, and scores for each of the three areas, the proficiency level achieved, and the performance descriptors. The institutional report presented a table summarizing distribution of total scores, with frequency and percent of the total group in each range; and a table summarizing the number of students achieving each level in the three language areas. In the individual reports graphs illustrating the scores in the three areas were also included. ELASH also included a questionnaire that asked the examinee's age and educational level, and explored different types of exposure to English, such as years studying the language, whether the student lived in an English-speaking country and for how long, and whether the student was exposed to English by reading, television, and movies. The group results were reported to the school and used for strengthening instruction. It should be noted that the ELASH reports were the first PRLAO reports providing qualitative descriptions and interpretations of the scores.

ELASH became operational late in 1999. Within five years, more than one hundred schools and universities in six countries were using it. In 2003, psychometrician Gary L. Marco, formerly at ETS, conducted reliability and validity studies that showed ELASH met high standards in both. In 2004, a second generation of the tests was developed

with some changes including adding 30 minutes to ELASH II and using a CD for the listening part. Pretesting was conducted in 75 schools and universities in seven countries. ELASH was now a mature test used for assessing individual proficiency, for placement in college courses, for certifying established proficiency levels in specific institutions, and even for evaluating English teaching programs.

Puerto Rico Statewide System Initiative.

Beginning in academic year 1998-99 and continuing through 2002, the PRLAO was contracted by the Puerto Rico Statewide Systemic Initiative (PRSSI) to provide technical and testing support to this project aimed at improving the teaching and learning of science and mathematics in the public schools. The National Science Foundation established the Statewide Systemic Initiatives in 1991, and Puerto Rico joined in 1992 when the University of Puerto Rico and the PRDoE received a multimillion dollar five-year grant, which was renewed in 1997. The PRSSI project was focused on training teachers to work with a new standards-based curriculum, making use of active learning methods and providing continuous monitoring of student progress. The Resource Center for Science and Engineering, based at the UPR Río Piedras Campus, hosted the project, which included other higher education institutions as minor partners. The project used a pyramidal strategy. It introduced training for teachers and new curriculum in a few elementary schools, which became demonstration centers from which to expand to more schools. The project then gradually moved into the secondary intermediate level and finally to the high schools, eventually reaching over 400 schools.

When the proposal was being prepared, we were asked to write in its support and make available the PRLAO's assessment and guidance services. But when the grant was awarded, PRSSI decided to go with ETS because they had manipulative performance assessments, which we did not. In 1997, PRSSI decided to prepare its own tests and requested the PRLAO to support it in this effort. This was the beginning of a fruitful collaboration that continued until the project was completed in 2002. Initially, the agreement called for PRSSI to develop tests in math and science for grades 4, 8, and 11, and for the PRLAO to provide administrative and technical support, score the tests, conduct statistical analyses, provide feedback to improve the items, and submit the appropriate technical reports. The tests themselves included multiple choice and student-produced response items and were administered in a pretest and post-test design to measure change in achievement after a year of teaching with new materials, active methods, and trained teachers. After the first year, we also assumed responsibility for printing and delivering the tests to the participating schools. In four years, we handled close to half a million tests.

But as the project progressed, new initiatives came up which substantially expanded the PRLAO's role in the overall evaluation of the project. Numerous psychometric analyses were conducted to validate the tests and compare performance of different groups, including performance by gender and generations of PRSSI students. A very important initiative was to include items from the TIMSS test (Third International Mathematics and Science Study) in the PRSSI test and calibrate the two. This made it possible to compare the results in the local test with those of 40 countries where the international test was used. Another initiative was to compare the performance of the PRSSI students with non-PRSSI students and with private school students, in the PEAU mathematical reasoning and math achievement tests. The PRSSI students obtained significantly higher score averages than the nonparticipating students and also did better than the private school students. The rigorous assessment strategy carried on by PRSSI and the PRLAO was recognized by the NSF as one of the reasons for the success attained by the project.

Much of the credit for the important contribution made by the PRLAO to this project should go to Antonio Magriñá, our director of Test Development and Research.

Second generation of the Teacher Certification Tests.

As we know, the Teacher Certification Tests (PCMAS) had gained high visibility in the Commonwealth and contributed significantly to the College Board's image as an educational service organization supporting high standards and excellence. Unfortunately, after the initial external development funds were used, the PRLAO had to subsidize the tests as expenses surpassed revenues by close to \$100,000. In 1992, we had informed the teacher training institutions and the Department of Education of this situation and warned that we had to reduce the deficit by increasing fees and limiting expenses to the bare minimum needed to maintain, administer, and score the tests. This meant that important research had to be put on hold and that no additional tests could be developed. Another measure to increase revenues was taken in FY1995-96 when a new individualized institutional report was designed to be sold for a fee to the teacher training institutions. The report was computer-produced using a newly

developed data base and included descriptive statistics of the scores and subscores for the current and previous years, comparative statistics with the tested population, and a summary of the responses to the student questionnaire. The revenue obtained the first year covered the development costs, but not all institutions ordered it. In FY1996-97, we eliminated the November administration and we privately informed the Department and the college presidents that we could no longer continue to subsidize the three specialized tests and would not administer them in 1998 unless the Department subsidized them. We also explained that the Basic Battery needed a thorough revision to align it with important changes that had taken place in the educational system since they were first developed almost 10 years before. This revision was not possible without additional resources.

This announcement resulted in a meeting with the Secretary of Education, Mr. Víctor Fajardo. We discussed the program's fiscal history, explained our decision to discontinue the specialized tests and to stop further work on the Basic Battery, and we considered the implications of increasing fees beyond the candidates' ability to pay. The Secretary accepted that the Department had to provide financial support to the program and we agreed in principle on how to make it possible through a contract to update the existing tests, develop new ones, and operate the program. A low fee would be charged, and the Department would pay the difference between our expenses to run the program and the income obtained from the fees. But the Secretary wanted the Department to control all aspects of the program, reducing the role of the universities, and limiting ours to mere contractors. We argued to convince him that the alliance established by Fortier in 1987, bringing together the Department, the colleges, and the College Board had worked to the satisfaction of all and had given the Teacher Certification Testing Program a unique status in the community and, thus, should be kept. We agreed to appoint a Consulting Committee formed by senior members of his staff and deans or department heads from the teacher training institutions to consider changes to the concept, nature, content, and structure of the tests.

The committee held five meetings between October 1998 and April 1999. In the first meeting, Secretary Fajardo explained his vision of the tests, stressing that these should aim higher than the minimum competencies needed to be a teacher, raising the passing score. He further requested that the tests' content be aligned with the philosophy of the ongoing education reform based on the community schools. He also called for increasing the English component in the Fundamental Knowledge Test, and to add questions about the use of technology in education in the Professional Competencies Test. The Department's contingent on the Committee included five senior level staff members led by Dr. Isidra Albino, Under Secretary for Academic Programs, whom the Secretary appointed Committee Chair. The representation from the colleges ranged from 7 to 15, all education deans or directors. María Elena Vargas and I represented the College Board.

As was to be expected, the dynamics of these meetings was quite interesting. On the one hand, the Department staff and the college people did not always see eye to eye on several issues, such as increasing the minimum passing scores and making the tests more difficult. On the other, the college's education specialists and the College Board had different perspectives on the number of tests that should be developed and on the use of multiple-choice and open-ended questions. The committee initially considered 15 major recommendations, several of which were simply not realistic. But the discussions were intelligent and productive. At the end, there was agreement on several basic ideas to guide the development of PCMAS. All except one were integrated in the final proposal submitted to the Department. From the outset, it was agreed that the College Board would continue to be responsible for developing, administering, and reporting the PCMAS under a contract with the Department. Also, that test content should reflect the professional standards for teachers established by the Department and the achievement standards for the five basic subjects of the public school curriculum. There was also consensus that the tests' content should reflect the principles of the ongoing school reform: constructivism as the framework for the teaching-learning process, the cognitive-humanist approach to the development of linguistic and reasoning skills, the new emphasis on the teaching of English, the use of technology in education, the need to strengthen standard-based evaluation of learning, and the new teacher roles stemming from the creation of the community schools. These agreements were closely aligned with Departments' interests.

The Consulting Committee also agreed that there should be ample participation of the academic community in the development and maintenance of the PCMAS Program. Concerning the issue of multiple-choice items, consensus was established to keep that format but to eliminate purely factual recall items, and to introduce in every test at least one open-ended question calling for analysis of a simulated pedagogical situation or a case study. Finally, it was agreed that the Basic Battery, comprising a test of Fundamental Knowledge and Communications Skills, and a Professional Competencies Test, would continue to be required of all candidates for a teaching license, but the Professional Competencies would be offered in two options: Elementary Education and Secondary Education. Two

new specialized tests would be developed for certification in Social Studies/History, and in Science, respectively; and the three original tests in Spanish, English, and Mathematics, should be thoroughly revised to incorporate changes in the content and philosophy of the programs at the PRDoE and new disciplinary approaches.

The final proposal was submitted to the Department on April 26, 1999, and it called for conducting the work in two phases. The first phase included developing the four new tests, beginning in summer 1999 and ending with the first operational administration of the tests in March 2001. It also included establishing minimum passing scores. The second phase, to revise the four original tests, was to begin in January 2000, with the first operational administration to take place in March 2002. It was a complex and difficult project spanning four fiscal years and involving simultaneous administration of the existing program with pretesting of the new tests. Consultants were recruited to conduct eight curricular studies and a study of teacher functions or job analysis. Test specifications were validated with samples of education specialists, schoolteachers, students of education, and Department of Education supervisors. It required organizing and coordinating the work of eight test committees and numerous item writers. Many experimental sections had to be assembled and spiraled into the existing tests for pretesting. The logistics of these activities were mind-boggling. We were fortunate to have María Elena Vargas, the PCMAS director since 1993, leading the project. She received the usual strong research support from Antonio Magriñá. Other staff in Test Development and the other divisions contributed significantly to the effort: Luz Maritza Fernández, Andrés Meléndez, José Rosado, Miguel Cintrón, and Luis Rivera.

During these same years, the Department called on the College Board to support the implementation of a federal requirement to evaluate teacher training programs. During a meeting that the Secretary was holding with college presidents to inform them that the Department had to evaluate the programs and make the results public, it was suggested that the College Board participate in the evaluation as the administrator of the teacher certification tests. The Secretary called to ask if I could go to the meeting. Our office was close to the Department so I accepted. When I arrived, the Secretary said half-jokingly that the presidents were not happy with the Department evaluating their institutions and they wanted the College Board to do it. I diplomatically refused, arguing that we were a membership organization and all the institutions on the island were members, that the institutions were active collaborators in the development and administration of the PCMAS tests, and that the College Board did not evaluate academic programs. After much discussion and the insistence of the presidents and the Secretary that the College Board be a part of the evaluation, a compromise was reached. A tripartite steering committee was appointed to implement federal guidelines for the evaluation and organize the process. The Under Secretary of Education, the Executive Secretary of the Council of Higher Education, and I were “appointed” by the group to constitute the steering committee for the Teacher Training Quality Report Card. I accepted on two conditions: that the test scores should not be the only criterion and that the Council of Higher Education be responsible for implementing the evaluation and follow-up of the teacher training programs. As the licensing agency, they had the experience and the staff to do it. Our responsibility was limited to certifying the valid student graduation cohort for each institution and the number that passed the tests from each cohort. The committee was active for several years, at least to my retirement from the PRLAO.

In 2000 and 2004, elections brought new administrations to the island as well as the typical corresponding changes in the Department of Education leadership. This time, the new administrations honored the existing commitments to support PCMAS and have annually renewed the contracts supporting the program. The College Board has been able to operate the Teacher Certification Tests without having to subsidize the tests and has conducted several research studies to support the program. As part of the services provided, the PRLAO administers for the Department the process to establish the graduation cohorts and the graduation rates required by the Teacher Training Quality Report Card and reports these to the institutions and the Department.

A new guidance project for the Public Schools: 2003-04.

As we know, in 1994-95 the Puerto Rico Department of Education stopped using the Guidance Information Service (SIPOE), but private schools in Puerto Rico and Mexico continued using it. Meanwhile, the renewal of SIPOE gave way to a much better instrument for guidance, first named the Sistema and later CEPA, which was first used in 1997-98 in Puerto Rico and in Mexico. In 1999, 26 public schools participating in the federally funded Tech-Prep Program began using what we called the College Board System, which included CEPA, the PIENSE Tests, and PEAU. But we had higher aims for CEPA, as we knew how much it could help guidance counselors and strengthen the guidance program in the public schools. Late in 2001, I made a presentation to the new Secretary, Dr. César Rey, and discussed

with him the positive reaction of the Tech-Prep schools to CEPA, as well as the requests we were getting from counselors around the island to have a guidance instrument available. Since he had been the Executive Secretary of the Commission on Transition to College, Dr. Rey was well aware of the limitations under which counselors worked and of the commission's call for the College Board to support counseling. He showed great interest in CEPA and requested that we submit a proposal that should include intensive training for counselors and administering CEPA to all eighth-graders in the public schools.

We submitted a comprehensive proposal that if accepted would strengthen substantially the guidance program in the intermediate secondary level (grades 7 to 9). There were four major parts to the project: counselor training, administration and scoring of the CEPA Inventory, individual and group reports, and follow-up activities. The Department had some difficulties finding funds for the project, but late in 2003 we were given the go-ahead. Janning Estrada, who had prepared the proposal with Special Projects Coordinator Idalia Pedrosa, was asked to manage the project, and we brought in a retired public school counselor, Carmen Méndez, as day-to-day general coordinator. Additionally, 22 other counselors were recruited as part-time district coordinators. Each of them worked closely with school counselors from three to five geographically nearby districts.

The first administration took place the second week of February 2004. A total of 42,846 eighth-graders from over 400 schools completed the Inventory, 92% of the reported eighth-grade population. The second week of April the individual and group reports were delivered to the schools. There were two student profiles for each student, one to take home and the other for the school. A special informative brochure was sent to the parents to motivate them to talk with their children about the profile and visit the school counselor. Also, each school received two lists: one for students who had stated they were not considering high school after grade 9, and one for students who required immediate attention based on their response to certain questions in the inventory. Two copies of a summary of responses from all students were also sent, one for the principal and the other for the counselor.

Five six-hour workshops were conducted for counselors, the first one before the administration to train them how to administer the Inventory and the other four, after the administration, were focused on understanding and using the individual and group results and planning follow-up activities for the students. Each student received a copy of the workbook *Mi Perfil y Mis Planes Futuros* designed for reflective exploration of self and of future plans, with the support of the counseling team or independently.

Statistical summaries of each school, the eight educational regions, and the total eighth-grade population were delivered to the Secretary in May. A narrative report with the salient findings and recommendations for the counseling program was delivered and discussed with him in June. The importance of this project for the public schools cannot be overestimated. For the PRLAO, it represented retaking the role that SIPOE originally played in support of guidance and counseling, this time with a much better instrument and a systematic training for counselors. But in addition to the substantial strengthening of the guidance and counseling function in the public schools, there was the information gathering function. It is not an exaggeration to say that never in the history of education in Puerto Rico had so much information been collected about how eighth-graders (or any other grade population for that matter) felt about themselves, their abilities and needs, their motivation for school, and their occupational interests and values. The successful operation of this project required much support from the Test Administration and Educational Services Division, the Warehouse/Distribution Center Unit, and especially from the staff at the Information Technology Division.

The continuation of this project was interrupted for one year, but before my retirement we were able to begin negotiations for continuing it for school year 2005-06 and extending it to the students in tenth grade.

Another round of changes to the PAA: 2003-06.

In year 2002, the Trustees approved major changes to the SAT. The most important of these were adding a writing test; eliminating analogies from verbal reasoning; adding more reading, and changing the name to "critical reading"; and having more Algebra content in mathematical reasoning. It was not the first time that these changes were considered. In 1988, Trustee Dean Whitla had presented these very same changes together with others, as possibilities for the New SAT to the Puerto Rico Office Advisory Council. As we know, the New SAT eliminated the antonyms and added double passages in verbal reasoning, and introduced student-produced response items in mathematical reasoning, but left the two-section SAT structure untouched. The new SAT became operational in 1994, and for a few years no more changes were contemplated. But the issue of how relevant the reasoning tests were for college

admissions as compared with tests more directly aligned with what the students were taught in high school and in college was being discussed within the College Board and outside of it. The issue got national attention during 2000-01 when President Atkinson of the University of California discussed and later recommended dropping the SAT for admissions in the UC System, and proposed requiring instead several SAT II achievement tests. In January 2001, President Caperton had informed our Advisory Panel that changes were being considered in consultation with testing experts and educational leaders.

In August 2002, Fred Dietrich informed the Advisory Panel that major changes to the SAT had already been decided and made public. He made a detailed presentation of the rationale, changes, technical data, and the extensive consultation to the different College Board constituencies, stressing that the quality of the test would not be diminished in any way. The rationale for these changes was to strengthen the SAT I assessment of college success skills in math, reading, and writing and maintain it as the premier college admission tests, increasing its predictive validity and bringing it closer to curriculum and instructional practices. The addition of a writing test was a reaffirmation of the Board's traditional focus on the teaching and learning of strong writing skills. The New SAT would have three sections, each scored and reported separately. A writing section consisting of a multiple-choice part testing grammar, usage, indirect writing skills, and a written essay. A critical reading section, as the verbal section was renamed, omitting analogies and adding paragraph-length reading passages, while vocabulary would be assessed in the context of reading. The mathematics section added more Algebra II items and deleted quantitative comparisons. The changes would be effective in spring 2005. Essays would be scored by two independent readers who would receive them electronically. The second New SAT would be ready for the spring of 2005, 10 or 11 years after the first revised SAT came out in 1994.

Once again the PRLAO faced the dilemma of maintaining the PAA within the SAT model, which meant introducing the same changes, as we did in 1996, or move away from that model. Adding a writing section would totally disrupt our admissions testing program, which had five required tests in one day. Since adding a sixth test the same day would cause student fatigue, we would need two testing days. Another possibility was to convince the colleges to eliminate the required achievement tests and make them optional. The Advisory Panel did not reach any decision in that first meeting as we all agreed that it was necessary to seek the opinion and suggestions of our constituencies. And the staff needed to analyze the financial impact of the different alternatives.

Several focus groups and meetings were held during 2002-03 and 2003-04. Presidents, chancellors, academic deans, chairs of Spanish, English and mathematics departments, admissions officers and institutional researchers, counselors from colleges and high schools, and teachers participated. The PEAU test committees also discussed the possibilities. Special sessions were held in the annual conference open to all attendees. The general consensus was that adding a writing test with an essay was premature. There was general agreement that the five-test admissions testing package already provided more information on the students' abilities and knowledge than the new SAT would provide except for the essay score. The achievement tests produced nine subscores in addition to the three whole scores and, since 1997, we had been testing writing skills indirectly with multiple-choice items on the Spanish Achievement Test. This section was 25% of the test. Also, the achievement tests were curriculum aligned, which was one of the arguments for changing the SAT. On the other hand, the achievement tests were not generally used for admissions as such but for placement, and some people felt that writing was so important that it should be required. The majority of public high school people felt that adding writing would make it much more difficult for their students to gain admission to the University of Puerto Rico. There were no problems with eliminating analogies and increasing reading. Most of the English teachers suggested adding writing and listening to the ESLAT. The only group unhappy with eliminating the analogies was the PAA Test Committee. They felt that the analogies were good discriminators at the high end of the scale.

Our financial analysis of the available options concluded that adding writing as a sixth test and having two days for testing, or making the achievements optional would not be cost-efficient, and the additional expense in scoring the essays would probably make the admissions testing program not self-sufficient or require a large increase in the fees. In addition, there were doubts about the logistics of scoring the large number of essays on time without having the electronic infrastructure.

The PRLAO strategic management committee discussed all the findings from the consultations, and the technical, administrative and fiscal implications of replicating the SAT changes and came up with recommendations that we presented at the January 2004 Advisory Panel meeting. We decided not to have the essay but to introduce the other important changes. On Verbal Reasoning, the analogies were eliminated and more short reading passages

were added, but we retained the test's name. On Mathematical Reasoning, we added Algebra II and eliminated the verbal mathematical comparisons. We retained a section on elementary statistics and probability. On the Spanish Achievement Test, the multiple-choice items measuring writing skills were increased, eliminating the section on Literary History. On the English as a Second Language Test, the section on language usage was reduced to make space for a section on basic writing skills. The Math Achievement Test remained unchanged with its four sections in Arithmetic, Algebra, Geometry, and Statistics/Probability. As one can see, the major difference between the PAA and the SAT would be the written essay, but indirect assessment of writing skills in Spanish was expanded from 25 to 30% and a small section in writing skills was added to the ESLAT. A subscore was reported in Spanish writing skills. In January 2004, the Advisory Panel gave its blessing to the staff recommendations, and work began. The new tests were scheduled for October 2006. Antonio Magriñá directed the test development and statistical work, supported by Grace Rodríguez and María Trinidad, while María Maldonado designed and implemented a massive communication plan to reach all students who would take the exam in 2006. Attractive pocket-size accordion booklets were distributed through the schools to all students in tenth and eleventh grades in 2004 and 2005; full-day workshops for public school counselors and teachers were conducted in coordination with the Department of Education, and similar workshops were held for private school staff. Special booklets were sent to each counselor, and teaching materials were made available to teachers. Numerous presentations were made in all the relevant professional conferences. A constant flow of news in the *Academia* newsletter kept the educational community informed. Eighty thousand guides to PEAU were sent free to the schools for distribution to students in August 2006. When the October testing date arrived, the students knew exactly what to expect. The first administration took place after my retirement, but it went smoothly, as reported in *Academia*.

Inter American University Assessment Project.

Inter American University of Puerto Rico was the largest private university system in Puerto Rico, operating 11 campuses throughout the island. In 2004, the Vice President for Academic Affairs approached us seeking our support for developing a testing program to assess their students' achievement after completion of the required curriculum of general studies (PEG) or core curriculum. This was motivated both by an internal interest in finding out how the students from the different campus were doing, and an external requirement to strengthen assessment in all institutions accredited by the Middle States Association of Colleges (Standard 14). We first suggested that they use the PEAU reasoning and achievement tests, but the institution's faculty was steadfast in developing their own tests. The administration requested that we provide training and technical assistance to their test committees and conduct the statistical analyses to validate the tests. Our role would be that of an external consultant supporting the institution's assessment team. This was not new to the Office since during the early years, we did it in Latin America and more recently we had proposed to do similar projects in Bolivia. Our Strategic Plan had contemplated that we could provide these services as another way to extend our influence. After some internal discussion, we decided to accept the challenge.

More precisely we had three responsibilities. First, we were to advise the vice president on the logistics and practicalities of establishing an institutional standardized testing system. Second, our staff would conduct technical workshops to train the institutional test committees in the basic principles and techniques of test development, including defining specifications, item writing and review, and test assembly. Third, our staff would conduct statistical analyses after the pretesting and the first operational administration and discuss the results with the test committees. The three-year project began in October 2004 with María Elena Vargas and Grace Rodríguez as the project leads.

The Rafael Carrión Jr. Excellence Award.

In 2004, we were approached by the Banco Popular Foundation who wanted to establish an annual award to recognize academic excellence in high school graduates. The award would carry the name of banker Rafael Carrión, who had served for many years as president of the largest Puerto Rican Bank and was the father of the incumbent president, Mr. Richard Carrión. It would consist of a medal to be awarded in a special ceremony and a \$1,000 cash award.

The Foundation Board, which included at least two educators, was convinced that the scores on the PEAU admissions tests was the most objective criterion they could use. This proposal required careful consideration because the College Board had always turned away from using admissions tests scores as the sole criterion of academic excellence. The National Hispanic Scholar Award used test scores but considered other criteria such as community service and school

recommendations. The whole issue of test scores-based awards had become controversial that year, because questions of equity were being raised in the U.S. about the National Merit Scholarship Program that used the PSAT/NMSQT as its basic selection criterion. But the fact was that in Puerto Rico, civic organizations and even municipal governments had for years recognized the highest scorers in specific schools and towns. And the PRLAO had established a certificate of recognition for the one hundred highest scorers from the public schools and the same number from the private schools, to establish some equity.

We brought up the proposal to Fred Dietrich who in turn discussed it in NYO. There was some discomfort with the idea unless we could come up with a selection process that minimized equity questions and factored in other academic criteria. Antonio Magriñá designed a novel selection process that we felt met this requirement, and NYO gave us the go-ahead. The PEAU scores were used to select a preliminary group of all students who had scored at least 3,200 in the five PEAU exams, out of a possible 4,000. This group was further reduced to those scoring three or higher in at least three or more Advanced Level examinations. Our reasoning was that the student that chose to take three of the four available courses and scored high in all of them was certainly showing very high academic motivation and excellent achievement. Finally, to minimize the effect of socioeconomic and school differences, the awards were distributed proportionally according to the number of students from public and private schools within each educational region. On August 15, 2005, the first Rafael Carrión Jr. Excellence Awards were presented to 85 high school graduates in a ceremony at which Mr. Richard Carrión and members of the Foundation presided, and which was attended by the Secretary of Education, the honored students, and the proud parents. The College Board was represented by the Vice President of PRLAO, the Director of Test Administration and Educational Services, José Barceló, and Antonio Magriñá, the executive director for Test Development and Research.

H. Restoration, Growth, and Diversification of Latin American Activities from 1987 to 2005.

Changing conditions in higher education in Mexico bring new opportunities to serve more private institutions and to begin working with state universities.

A strategy for growth and diversification. As we have previously described (Part II), the PRO's Latin American Activities suffered a setback from 1983 to 1985 because of currency exchange problems faced by the large institutions in Venezuela and Colombia. By 1986-87, the PAA use was reduced to 16,040 and about 80 percent of these were administered by the Monterrey Institute of Technology (ITESM) in Mexico. Venezuela and Colombia were lost, as these countries developed national tests, but in Mexico new opportunities were opening up and several private universities began contacting our Office to use the PAA. In 1987-88, we asked a recently retired admissions officer from ITESM, Eng. Rodolfo García Garza, to work for us as a part-time consultant, visiting the institutions that contacted us, providing information about the PAA and the conditions for institutional administrations, and what was most important, making a decision about the institution's commitment to administer and use the test properly. When he had identified two or three institutions with a good profile, I would travel to Mexico to complete the agreement.

By 1991-92, there were 11 universities testing close to 40,000 students. This number included students tested by LASPAU and a USAID program in Honduras. A Brazilian organization (ALUMNI) providing scholarships for study in the United States began using ESLAT to screen candidates, testing close to 4,000 during these years. In the same period, two internationally supported agricultural science institutions, the *Escuela Agrícola Panamericana* in Honduras and the *Escuela Agrícola de la Región Tropical Húmeda* (EARTH) in Costa Rica, began using the PAA. EARTH is an internationally supported school training Latin American students to become successful agribusiness entrepreneurs, and since 1991, a traveling admissions officer regularly administers the PAA to small groups of candidates in almost all Latin American capitals. A most important new user was the *Universidad Autónoma de Aguascalientes*, the first public Mexican institution to use the PAA, of which we will have more to say later. The time was ripe for the College Board's PROLAA to make a comeback.

In June 1992, when the Board of Trustees met in San Juan to celebrate the 500 years of the Discovery of America, I was asked to make a presentation summarizing the work conducted at the PROLAA. I took this opportunity to reaffirm the unique position of the PROLAA as providers of services to facilitate transition to college in Spanish-speaking countries and to propose that the Board invest more resources to expand and diversify these international

services. Mexican higher education was already undergoing important changes stimulated in no small part by the signing of the North America Free Trade Agreement. The private sector was growing and the government was pushing the public institutions to improve the quality of their programs. Other countries were moving in the same direction. These developments created new opportunities for the PROLAA to expand our services and extend our educational mission. But to take advantage of these opportunities, we needed additional staff and other resources. I argued that this investment would soon pay for itself and strengthen our financial health.

The presentation went one step further and suggested that the College Board should formally include an international role in the organization's mission statement and in the organization strategic planning. My reasoning was that the world was moving into a new era of international cooperation in commerce and that this would stimulate important developments in education, such as increased movement of students across borders, international certification and accreditation of studies, and an increase in international study programs and institutions. In Latin America, the United States would play a major role in these developments and the Board, as a nonprofit association, was ideally suited to participate. The Trustees listened politely and raised interesting questions about the presentation. At the end, they praised what the PROLAA was doing, but took no formal action. There was no rush to make available more resources for our work in Latin America or to formally define an international role for the organization.⁴²

When the PRO prepared its First Five-Year Plan in 1991-92, we had as a major goal to increase and diversify services in Mexico, targeting the private sector. Our aim was not only to expand PAA use but also to introduce other programs such as PIENSE, SIPOE, and ESLAT. Since resources were not abundant, we had to take a slow approach, borrowing staff time from other programs and allocating some travel expenses for the executive director and other staff. One of the steps taken was to extend the consultant's contract so that he could begin seeking out on his own prospective customers. Gradually, a simple marketing strategy took form focusing on two ideas: the College Board's position as the leader in college admissions, exemplified by the SAT, and the PRO's commitment to develop tests that respect the linguistic and cultural characteristics of Spanish-speaking students. We also began attending professional conferences to position the College Board in the Mexican academic environment, and to introduce our services to a wider audience, and we established professional relations with academic organizations such as the Federation of Private Higher Education Institutions (FIMPES) and the National Association of Universities and Institutions of Higher Education (ANUIES).

We also conducted experimental administrations of these programs in a few Mexican institutions and schools. In 1993, PIENSE II was used for the first time operationally at the University of Puebla and by 1994-95 was definitely established in Mexico as an admissions test for upper secondary school with a volume substantially higher than in Puerto Rico. The PIENSE II tests included a test of English, but we soon found out that it was too difficult for the students from the public schools. So we proceeded to pretest many items from several English as a Second Language tests in order to have their psychometric indicators to assemble other tests more appropriate for students from a different background. This research was conducted on a very low key with no budget allocation because some people were not sure that we should venture into testing English language proficiency beyond what we already had. But we continued our work, laying the ground for later developing ELASH.

The strategy implemented was successful: more universities and schools requested our tests, including PIENSE and SIPOE, and as we shall see later, the College Board's PRLAO was soon to make important contributions to higher education reform in Mexico.

The public universities focus on improving quality: The ICED Report. Concurrently with these PRO initiatives, the discourse about public higher education began changing from the previous emphasis on growth to a new paradigm stressing quality. The Mexican federal government, the national association of universities (ANUIES), reform-minded professors, and international organizations, were convinced that fundamental changes were needed in the public universities. Evaluation and accountability became key words in all discussions. During 1989-90 the Ministry of Public Education (Secretaría de Educación Pública or SEP) contracted the International Council for Educational Development (ICED) to conduct an evaluation of the national system of higher education. A team of experts from Europe and America, supported by Mexican specialists, submitted a report in 1991 suggesting substantial changes in

42. The International Office and the PROLAA were able to keep the broad international issues alive with occasional activities. We arranged for President Stewart to attend a meeting of U.S. college presidents and Mexican rectores in Guadalajara, I attended a NAFTA meeting on globalization and higher education in Cancún, and the International Office organized a Pre-Forum Roundtable on transition to college in the Americas.

the way that higher education was operating so that it could contribute more efficiently to the economic and social development of the country (*Una estrategia para mejorar la calidad de la educación superior mexicana*, Mexico: Fondo de Cultura Económica, 1992). Among its many suggestions, the study called for revamping admissions procedures, using scientifically developed admissions tests, and putting an end to the open admissions of the graduates from the university-run *preparatoria* schools to the professional undergraduate programs.

The ICED report confirmed what several Mexican specialists in higher education had been advocating and the fact that it was backed by the SEP must have given needed momentum to the reformers. A group based in ANUIES began a project to develop a uniform admissions test. Through our friends in ITESM they requested to visit Puerto Rico to find out more about our operation. Reaffirming the Office's original charge to provide technical support to Latin America we agreed to receive them. In October 1992, a four-member delegation came to Puerto Rico and our staff explained to them how the College Board tests were developed and administered, including taking them to observe several test centers in operation. We explored the possibilities for a joint venture but they were set on doing it alone. Soon after, this group would become the nucleus of *CENEVAL*, a national evaluation organization supported by the SEP and which eventually became the largest testing organization in Mexico and our major competitor.

Other groups also sought our advice during these years. FIMPES was worried that a national admissions tests could be imposed on the private institutions. Its president, Francisco Abel Treviño, rector of *Universidad Regiomontana*, a PAA user, requested that we prepare a preliminary proposal for developing an admissions test battery for the 52 private institutions belonging to the Federation. We met several times to discuss the idea, but the members were more interested in having an accreditation process than in a common admissions test. Nevertheless, several of them became PAA users. At about the same time, we received visits from the organizers of the new technological universities, a fast-track project to offer three-year technical degrees. They were seeking advice on admissions and the possibility of using the PAA or PIENSE. Another group came from the SEP technical education division interested in tests to assess achievement in technical subjects, which were beyond our expertise. Even though these visits did not produce new users for our programs, they were evidence of the stature the College Board PROLAA had acquired in Mexican education circles.

The first request from a state university. But indeed the most important opportunity originating in this reform environment came while the ICED report was still in the making. Early in 1990, we received the first request from a state university to use the PAA, the *Universidad Autónoma de Aguascalientes*. The university's General Director of Academic Affairs, Dr. Luis Manuel Macías López, called the Office to inquire about using the PAA. We had a good conversation about adequate testing conditions and the PROLAA apprehensions concerning public universities. He understood quite well, but affirmed that his university was not typical and would meet all requirements established by the College Board. He promised to come to Puerto Rico with a formal request from the rector, and he would bring evidence to convince the College Board that the university could administer the PAA in compliance with the established standards. A few weeks later, Dr. Macías visited Puerto Rico, bringing with him information about the university's governance structure, the existing admissions process, and the norms on student academic progress. He argued convincingly why the College Board should support their goal to improve admissions with a better test, and that not to do it would be discriminatory. He concluded by inviting me to visit the campus as soon as possible so that we could organize the testing process and train test proctors.

This request produced intense discussion at the Office, where the traditional negative perception of Latin American public universities was deep-rooted. Most of the staff felt that they did not offer an adequate and secure environment to administer the PAA. On the other hand, Aguascalientes was probably an exception among the state institutions and had already integrated several of the changes that the ICED report was proposing. It was devoid of strident polarizations because basic agreements to establish a quality institution were shared by students, faculty, administration, the state government and the public. Its size was moderate, and contrary to common practice, it openly charged tuition and had a successful student loan program. Our contacts in Mexico had advised us that it was a stable institution. If we were ever going to break away from our past policy not to serve state universities in Mexico, this was the one to begin with. I consulted with Adolfo Fortier, who expressed his misgivings, but sensing my inclination to do it, suggested several ways to minimize the risks involved. I consulted with Vice President Ken Rodgers who saw this as an opportunity and advised us to go ahead. Needless to say, I went to Aguascalientes, and signed an agreement with Rector Gonzalo González Hernández. In June 1990, the College Board's PAA was used for the first time for admissions in a Mexican state university. The institutional administration process was conducted efficiently for 2,648 applicants with close to 200 previously trained professors acting as proctors under the close supervision of Dr. Macías, our consultant, and myself. A new chapter in the College Board contribution to higher

education in Latin America had been opened.

Strengthening communications and service: The College Board Latin American Conference. Soon after the institutional administration at Aguascalientes, we began planning a conference in Mexico to bring together the institutions using our tests and supporting services. Following the Mexican usage, we identified it as “congreso técnico,” that is, a technical congress. This conference would serve several purposes. It allowed our staff to provide support to all the user institutions without having to travel to each one of them. Accordingly, staff would make presentations on admissions policies and practices, testing and appropriate test use, placement, developing reasoning abilities, and others. A second purpose was to give the institutions an opportunity to report on their use of the College Board tests and the effects it was having in areas such as retention, academic progress, handling students with different academic development, etc. Finally, the conference had a marketing function because prospective users could attend to learn more about the College Board, our philosophy and our programs. In March 1992, the First College Board Technical Congress in Mexico was held at the Monterrey Institute of Technology with over one hundred participants from 30 institutions. Initially the congreso was held every two years and was focused on Mexico, but in 1999 it became an annual event, and its name was changed to the College Board Latin American Congress. Attendance increased substantially, and participants came from several Latin American countries and Puerto Rico.

The College Board becomes a partner in the reform of large state universities in Mexico.

Aguascalientes represented a breakthrough for the PROLAA. But the real challenge would come when three large state universities requested our services. These were really large, several times the size of Aguascalientes, and were going through a difficult reform process. The use of the College Board tests in the universities of Puebla, Coahuila, and Guadalajara was an important contribution to the reform of public higher education in Mexico. This contribution has been recognized by researchers in many publications and by several of the key personalities involved in the reform process. It is relevant to describe briefly the process by which these institutions began using the PAA and PIENSE II in order to understand better the role played by the PROLAA in this important stage in the history of higher education in Mexico.

The *Benemérita Universidad Autónoma de Puebla* (BUAP) entered the 1990s as the fourth largest institution in Mexico, with over 66,000 students and more than 3,000 professors distributed in their upper secondary schools or *preparatorias*, undergraduate (*licenciatura*) and graduate (*postgrado*) programs. Its recent history had been somewhat tumultuous as the extreme left controlled the governance structure under the “democratic” rule of “one person one vote” and established an open-door policy that brought uncontrolled expansion and increasing political conflict between different groups within and without the institution. The local elite abandoned the struggle and founded private institutions; and by the late 1980s, the democratic model had reached its limits, with the university becoming unmanageable and financially insolvent. The state legislature approved a new University Law eliminating the one vote one person rule, creating a university council with larger faculty representation, and reducing that of the students and nonacademic staff. After a short initial period of reforms, sometime in 1993 the state governor, Manuel Bartlett Díaz, and the university commissioned ICED to conduct a comprehensive evaluation of the institution. The governor had been national Secretary of Education from 1988 to 1992 and had commissioned the ICED report of Mexican higher education of 1991. The Puebla team was headed by Philip Coombs, who had also chaired the national study. The ICED team produced a development plan to achieve a productive future for the university and called for a comprehensive overhaul of the institution. As was to be expected, the report recommended revamping the admissions system and raising academic standards.

Most of these recommendations were assumed by Rector José Doger Corte, who since 1990 was leading a strong reform movement in partnership with the state government. All undergraduate programs were evaluated, and a credit system was established; new norms were enacted for student course load, academic progress and retention; a common core of courses in languages, mathematics, computing, and current affairs was developed; enrollment caps in traditionally overcrowded fields were set; student fees were raised; faculty development was supported; research and graduate studies moved ahead faster; academic facilities were improved; planning and budgeting based on information was initiated; and a university foundation was established to seek community support. In short, a major transformation of the university was in progress.

Early in 1993, Rector Doger contacted the Puerto Rico Office to request using the PAA and PIENSE tests in the admissions process for the class entering in August of that year. We faced a difficult decision because, unlike Aguascalientes, BUAP was a large and highly politicized institution with an unstable past, and we could encounter a

hostile environment. Sensing my reluctance, Rector Doger asked that we visit Puebla to meet with the ICED team and the University Council before reaching any decision. I went to Puebla and met with administrators, faculty, and a few students, and with ICED team members Dr. Coombs, the American chair of the team, and Lord Walter Perry, from England. Coombs took the lead, recounting the transformation that was taking shape at BUAP and how important it was for the future of the state and as an example for other state universities. Using the PAA and PIENSE was essential for establishing a reasonable admissions process free of undue political influences. If the PRO felt that the national College Board would not approve this, he would take the issue directly to President Stewart. Rector Doger explained that the university and the state government were planning a media campaign to inform the students, the parents, and the public that the new admissions process would be completely transparent and objective. And he made it clear that the university would take whatever measures were necessary to meet the College Board's requirements.

Near the end of the meeting, I asked Rector Doger if we could meet privately the next day. It was Sunday, and he invited me to breakfast. That morning we discussed the conditions under which we could have an institutional administration of the tests in Puebla. One of these was that the test should not be the sole criterion for admissions as they had planned; that the student's previous grade point average should be given some weight. I am not sure if he understood the technical arguments, but he understood quite well that this would get some of the pressure off the test and make him less vulnerable to attacks, and he agreed.

Organizing this institutional administration required very careful planning and a continuous flow of information to dispel false rumors and malicious interpretations. The governor himself made a public statement backing the new process. University and College Board staff were interviewed on several radio and televised shows as well as in the major newspapers. The university went as far as to store the tests in a bank vault and had the bank deliver the tests Saturday morning in armored trucks to the test centers.

On July 7-9, 1993, three staff members from PRO conducted three-hour workshops for 300 proctors for PIENSE II and on July 10, the test was administered to 6,460 applicants for the university's *preparatorias*. Later that month, on July 21, the Executive Director delivered a special lecture in the university's ornate eighteenth-century main hall on the use of standardized tests to strengthen the admissions process. During July 21-23, our staff and the consultant conducted training workshops for the PAA proctors, and on July 26, the PAA was administered to 14,972 candidates for undergraduate and professional programs. The administrations proceeded with no major problems and no disturbances whatsoever. Two weeks later when the admissions were announced, about 300 students and parents demonstrated in front of the main building for several days. The Rector met with them, explained how the admissions decisions were made, and announced that they could take the test again the following semester. The demonstration soon died down. The University of Puebla has continued using the PAA and PIENSE to this day and with the collaboration of our staff established a novel program for strengthening mathematical and verbal reasoning skills. It also used our Certification Test for English Teachers as one criterion to select faculty for the newly established English requirement for all students. And its Foreign Language School has also been using ELASH to certify proficiency and place students accordingly in the required course sequence.

The *Universidad Autónoma de Coahuila*, in the northern state of Coahuila, approached us through our consultant in Monterrey sometime in October 1993. In November, the Director of Academic Affairs, Lic. José M Fraustro, the Director of Admissions, Lic. Amado Durón, and three other functionaries visited us in Puerto Rico to formalize their request for using the College Board tests and to learn more about the College Board organization. They met with the staff at Test Development, Test Administration, and Information Technology divisions. Early the following year, an agreement was signed to authorize the UAC to conduct institutional administrations of the PAA and the PIENSE tests. On June 14-16, 1994, the Executive Director, three PROLAA staff and Consultant García Garza, conducted workshops for 280 faculty proctors for PIENSE II on the institution's three campuses at Torreón, Saltillo, and Monclova. UAC presented a new challenge: it was a multicampus institution in a large state. Going from Saltillo to Monclova entailed a four-hour trip across the desert. On June 17, PIENSE II was administered to 5,817 students. On June 21-23, the same team conducted workshops for 440 faculty proctors for the PAA on the three campuses, and on June 25, a total of 8,873 students took the PAA. The University of Coahuila conducted a flawless institutional administration and has continued to do so. Later, it also administered the CEPA inventory in its *preparatorias* and with the PROLAA's support, strengthened its guidance program.

The *Universidad de Guadalajara*, the state university of the State of Jalisco, is the second oldest university in Mexico and the fourth oldest in North America. In 1994 it was also the second largest university in the country, with 85,000 *licenciatura* students on 11 campuses and 80,000 preparatoria students on more than 90 upper secondary schools.

Only Mexico's National Autonomous University surpassed these numbers in both categories. From 1989 to 1994, under the leadership of Rector Raúl Padilla López, a strong reform movement developed and obtained legislation eliminating the governor's power to designate the Rector and reducing the influence of the students and the political groups in university governance. In March 1994, the university sent its Director of Planning, Professor Laura Puebla, to the Second College Board Technical Congress held at the *Universidad de Aguascalientes*, with instructions to invite us to visit Guadalajara soon, if possible right after the conference. The rector wanted to explore the possibility of using the College Board tests. I accepted the invitation and asked Dr. Eduardo Rivera Medina, an old College Board friend and expert on admissions who had given the keynote speech in Aguascalientes, to come along. Professor Puebla drove us to Jalisco and on March 17 and 18 we met Rector Padilla López and the other university officers. As his term was ending soon, it was under his successor, Dr. Víctor González Romero that most academic reforms were made, including the use of the College Board tests for admissions.

After the successful experiences with Aguascalientes, Puebla, and Coahuila, we were better disposed to reach an agreement with Guadalajara. The university staff had been in contact with Aguascalientes and Puebla and was familiar with our requirements. They soon had a reasonable proposal for a uniform and safe institutional administration of both tests to take place on their 11 campuses distributed across the state. Testing was set for the summer of 1995. Training the proctors and working with the university staff to streamline the logistics took four weeks in June and July. We needed three staff members and two consultants to train over 3,000 proctors on 14 different sites. On July 15 and 22, a total of 40,067 students took PIENSE II; on July 29, 19,413 applicants for undergraduate programs were tested with the PAA. This was the largest testing operation we had carried on in Latin America, and it was impeccable. The Universidad de Guadalajara has continued using the College Board tests to this day, and we have worked together on several projects to improve the quality of education at the upper secondary level, which comprised more than one hundred schools. More recently, they also added the ESLAT test.

In addition to the universities of Aguascalientes, Puebla, Coahuila, and Guadalajara, there were other public institutions that began using our tests during these years: the newly established state institution in Quintana Roo (May 1994), the prestigious specialized school of economics *Centro de Investigación y Docencia Económica* in Mexico City (1993), and the *Instituto Tecnológico de Sonora*, a special technological institute in the state of Sonora (1994). In 1995-96, over 55,000 students were tested with the PAA and over 62,000 applicants were tested with PIENSE II in the public sector. Both of these numbers surpassed by far the corresponding test use in Puerto Rico.

In December 1994, another financial crisis sent shock waves through the public and private universities that participate in our programs and in the PROLAA. The Mexican government devalued the peso, and the cost of the College Board tests in dollars almost doubled overnight. We responded swiftly to avoid a repeat of the late eighties currency problems in Venezuela and Colombia, proposing four measures to ease the impact on our customers. Senior management approved these proposals: a 10% discount for all the institutions, the College Board would pay shipping charges and expenses for technical visits, no fee increase for 1995-96, and extended time for paying bills. This was to give customers time to adjust to the situation. Our rapid response to this crisis was another example of the benefits of the autonomy obtained by the Office in the seventies. The emergency measures were successful. We did lose 5 percent of the volume as two universities left the program. But the large ones remained, and we gained another large one, Guadalajara. These measures were very well received by the institutions, and many of the rectores wrote to express their appreciation.

By 1996-97, the Latin American use of the PAA had reached 123,403 tests in 18 Mexican institutions and one in each in Costa Rica, Bolivia, Honduras, Argentina, and on the Madrid Campus of St. Luis University. The Mexican total was 98 percent of all Latin American use. Within Mexico, the ITESM's tested population, even though it had continued to increase weighted only 38 percent of the total, substantially less than the 70 percent at the beginning of the decade. Because the large state institutions were using over 68,000 PIENSE II tests, we can understand the extent of the achieved growth and diversification goals. These numbers fulfilled the First Five-Year Plan's goals for the region and turned Latin American activities into a solid revenue producer for the Office.

Appraising the College Board's contributions. Important as growth and diversification were for us, it was much more important to play a pivotal role in establishing an objective, transparent, and just admissions process in these public institutions. Sociologist Rollin Kent, Professor and Researcher at the University of Puebla and the Center for Advanced Studies in Mexico, is one of several academics who have studied the reforms made during this period. In one of his many publications on the subject he concludes that the use of the College Board tests in Puebla and Guadalajara "eliminated the influence of the student federation, of *political recommendations* and the discrimination

against the students who were not graduates of the *preparatorias*.” (See: Institutional Reform in Mexican Higher Education: Conflict and Renewal in Three Public Institutions, Washington, D.C. February 1998, Page 19). Another researcher, Misrael Gradilla, from the University of Guadalajara, after describing how admissions were traditionally conducted, explained the significance of the College Board tests as follows: “Once we applied the College Board exam, all this changed, and I believe that for the first time students have been admitted on the basis of their academic ability.”

Some key members of the political establishment in Jalisco were not happy at having lost their influence over admissions, and the state congress summoned Rector González Romero to explain why a foreign test was being used to admit students at the university. The Rector called us to get some historical and statistical information about the College Board, the SAT, and the PAA. In his presentation, he emphasized the independence of the College Board as a nonprofit association of universities not subject to any government or commercial pressures. He explained how the tests were developed and maintained by an international committee of Spanish-speaking educators, and that Mexican educators participated on these committees. But his major argument went to the heart of the issue: the admissions process was now fully transparent. The admissions formula established by the university council weighted the student’s previous achievement, represented in his grade point average (40 percent) and his developed ability to pursue higher studies, as assessed by the test (60 percent). The students were ranked from highest to lowest and admitted in that order until all the available places were filled. The legislators had little to say, and the university won the day.

In recent years I have met some of the leaders of the reform movement and asked them what moved them to seek the College Board and use our tests. Written comments from Guadalajara’s former rector, Dr. González Romero, are too long to transcribe here, but these are the key words he uses: experience, secure tests, technical quality, international use, standardization, independence, relevance, and support. Former Puebla rector, José Dóger Corte said that the prestige of the College Board and the fact that the PAA had been developed in Spanish and used in Mexico since the sixties were important, but he stressed that he would always remember that in spite of initial apprehension, the College Board was willing to take the risks involved in supporting the reform. Similar comments were made at other times by Dr. Luis Manuel Macías from Aguascalientes and Dr. Jose M. Fraustro from Coahuila.

Achieving secure and standardized test administrations in large state institutions. The decision to work with the state universities required that we established strict procedures to safeguard the security of the tests and to ensure that they were administered properly. The first administration in Aguascalientes gave us the opportunity to design and try out a manual of procedures that was improved with successive institutional administrations in the larger institutions. We used our testing manual from Puerto Rico but had to adapt it in many ways. It was necessary to establish a new culture of testing, stressing security, uniformity and adequate conditions for the students taking the tests. To administer the PAA, students had to be tested in typical classrooms, with no more than 40 students in each room, sitting at regular desks, and with two faculty proctors in charge. Further, all students had to be tested at approximately the same time. When a large population required a second date, a different test form would be used. The test booklets were shipped from our Chicago printer to a customs broker at the U.S.-Mexico border. The university would send two admissions officers to receive the shipment and transport it to a storage area with restricted access.

At each university, test centers were established in the professional schools and departments or in the *preparatorias*. On the testing day, the test center coordinators received the test booklets for their center and distributed them to the chief proctor for each room within the center. When testing time was completed, the proctors would count all used and unused test booklets as well as the answer sheets before the students could leave the room. Then they would take the materials to the center coordinator who would count everything a second time. After all the center booklets and answer sheets were accounted for, the center coordinator would bring everything to the campus center of operations where they would be counted a third time. Every time the materials passed from one person to another, they were counted and a receipt signed by both. All the proctors as well as other staff with supporting roles had to attend a four-hour training session to go over these procedures and the testing manual.

On the day the test was administered, College Board staff visited several testing centers to observe the process and were on hand at the operations center to offer advice if unexpected situations occurred and to supervise the final recount. In the multicampus universities, this often meant waiting until past midnight when booklets from the remote centers arrived. After all booklets were accounted for, they were packed to be shredded Sunday morning at a commercial facility under university and College Board staff supervision. The answer sheets were packed to be sent by UPS to Puerto Rico for scoring.

These strict procedures were established to make sure that no test booklet was lost. Even though a different form of the tests would be used the next time, it was important to avoid the situation where an old test form would be floating around with the ensuing rumors that the new test was not secure. We must pay tribute to the staff at these institutions who worked so diligently to achieve efficient and secure administrations of the PAA and PIENSE.

Working with the Legionnaires of Christ school system. In FY1993-94, the PROLAA began conversations with the prestigious Mexican private school system run by the Catholic religious order of the Legionnaires of Christ. This group operated the well-known Anahuac universities and 43 K-12 *colegios* spread all over the country. Although each school had administrative and budgetary autonomy, curriculum, and textbook development, teacher training, and academic standards were coordinated from a central office, later called the *Centro de Asesoría Pedagógica (CAP)*, based at their Anahuac university campus in Mexico City. Anahuac had been using the PAA as their admissions test since 1991, and Consultant Rodolfo García had been promoting the PIENSE batteries and SIPOE at the Legionnaires' *colegio* in Monterrey. When conversations moved to the central office, I joined Rodolfo and we reached an agreement with the Legionnaires to administer the tests in all their schools. This would be the first time that our tests were to be used in private secondary schools (*colegios*) outside of Puerto Rico, and it opened the way for other such schools to become users.

The Legionnaires' educational philosophy was focused on high academic achievement, including intensive English instruction, and character development. Almost all of their students came from the professional and higher socioeconomic classes, and their goal was to be admitted to the most selective universities in Mexico and abroad. They were interested in external assessments to measure achievement in basic subjects and intellectual skills and to compare achievement levels at the different schools. We had been conducting research to vertically link PIENSE I, SIPOE, PIENSE II, and PEAU to create a continuous academic guidance system to be used from sixth to twelve grade, so we proposed to adapt this concept to the Legionnaires' *colegios*. The initial formulation called for a computer-based academic counseling model using the assessment information produced by the tests, including the predictive projections, and other school-generated information. But this idea was not accepted by the Order's headquarters in Rome. The project was then focused on measuring academic achievement and development of cognitive skills in order to identify strengths and weaknesses in specific schools, and to guide curriculum revision and teacher training. At the school level, the individual scores were used to advise students on their academic progress.

In 1994-95, we conducted a first round of testing with over 8,000 students to establish norms for this particular population. PIENSE I was administered to 1,650 students in grade 6 and 1,462 in grade 7; 1,346 took SIPOE in grade 8, 1,340 took PIENSE II in grade 9, 898 in grade 10; and 1,538 took the PAA in grade 11. An offshoot of this project was the use of the same four tests to evaluate the Order's schools in Chile, Venezuela, Argentina, and Spain during 1996 and 1997. At around the same time, CAP requested our Certification Test for English Teachers to assess the English proficiency of all their teachers. After several years, the CAP decided to make the external tests optional for their schools, and about half of them dropped the tests. But in 1997-98, the center began providing evaluation and other educational services to non-Legionnaire private schools where they continued to use the tests. In addition, at least seven other universities of the Legionnaire's higher education system have become PAA users.

Resuming technical assistance.

In addition to the growth and diversification of our testing programs, during this period the PROLAA engaged in several projects to provide technical assistance in admissions and testing in some Latin American countries. Much of this work did not produce any significant revenue, but it bore witness to the recognition the Office had acquired and contributed to expand it.

Around 1992-93 we began sponsoring visits from high-ranking academic staff from Latin American institutions that were using our tests. During these visits, which lasted for two or three days, the visitors met with staff to consult about technical issues such as how to interpret and use institutional score reports, and content and predictive validity of the tests, and specific issue related to admissions. We also arranged for them to meet with staff at a local university to discuss administrative practices, special academic programs, and other areas of their particular interest. We received between five to seven visitors every year. At about the same time, faculty from several Mexican universities were appointed to the PAA and PIENSE test committees. We also conducted many workshops on item writing, test development and statistics, and assessment for faculty and counselors in the large universities.

In 1993, the Monterrey Institute of Technology asked our assistance to develop a test for admission to their graduate programs. They were using the Spanish version of the GRE but were unhappy with ETS's service. We considered the possibility of a joint venture but decided against this idea because it was beyond the College Board's mission, and Vice President Rodgers thought we should not compete with our esteemed partner. Anyway, Carlos López, Director of Test Development, requested a sabbatical leave in the summer of 1993 to work on the project in Monterrey with the Board's approval. The test became operational the following year and since then it has been used by the Monterrey Tec, LASPAU, and other Mexican institutions.

In March and June 1994, we conducted workshops on admissions policies and practice and the use of standardized tests for two faculty groups and administrators from the Republic of El Salvador. The first workshop was held at the University of the Sacred Heart in Bridgeport, Connecticut, and the second one at the College Board in New York. Both groups were sponsored by U.S. Department of State grants.

Around the same time, we began collaborating with reform-minded educators from Bolivia. First, we advised the founders of a new private university established by a local foundation in the city of Cochabamba on the modern practices in student recruitment and admissions, assessment of academic standards, and norms for retention and graduation. Then in 1994, Bolivia's Under Secretary of Higher Education, Dr. Manuel Arellano, visited Puerto Rico seeking help on a project to improve the quality of public school teachers that the government was undertaking. As one of the founders of the UPB, he was familiar with our programs and wanted to administer the PAA immediately for admission of students at the 24 Teachers Colleges, and our Teacher Certification tests as their licensing exam the following year. At the government's invitation, I visited Bolivia and was not positively impressed by the overall situation. The government was trying to improve education with support from international organizations, but the teachers were unhappy with the proposed changes. We advised against administering the PAA for admissions that year and recommended an experimental administration to find out if the test could be used validly with that population and to create a better climate for future administrations. As to the Teacher Certification tests, we suggested that Bolivia have their own tests aligned with their teacher training programs and offered our technical assistance. At their request, we prepared a complete plan to develop the tests in a two-year period. Political and financial difficulties killed both ideas.

In 1998, Dr. Arellano, now leading another government agency, and Dr. Absael Antelo, rector of the UPB, invited us to meet with the coordinating commission for higher education (*Comisión Ejecutiva de la Universidad Boliviana*) and the new Under Secretary of Higher Education to explore possible use of the PAA for admission to all universities. We agreed only to conduct a pilot administration with a national sample of 1,200 students in their last year of upper secondary school, after which we would decide if a national administration was feasible. The pilot's scores were low in verbal reasoning and showed substantial differences in students from the larger cities and students from the rural indigenous groups. Part of the explanation seemed to be that the students were not given time to familiarize themselves with the guide and did not have experience with multiple-choice items that were not factual. But there were also serious limitations in reading ability among many students. We concluded that it would not be fair to use the PAA for admission under these circumstances. But the Bolivian educational authorities were set on introducing standardized examinations in the transition from secondary to higher education and requested a proposal to test all students in the last year of the secondary cycle. We prepared a proposal that included three important conditions: First, a language specialist from Bolivia would revise the test instructions and the reading passages to make sure they conformed to Bolivian usage; second, the student guide for the test would be edited and printed in Bolivia and distributed by the schools several months before the testing date; and, third, the schools had to conduct sessions to familiarize the students with the multiple-choice items using the sample items and the practice test included in the student guide. The College Board would train a group of Spanish language and math coordinators from each region who would in turn train the teachers at the schools to conduct the sessions. The proposal was accepted in principle but when we began negotiating the specifics, we realized that bureaucratic bickering inside the Ministry of Education would probably doom the project, and we retired the proposal.

In 1995, the U.S. Department of State invited the PRO to provide technical assistance to the Council of Higher Education of the Republic of Honduras. There were some academics in Honduras who had attended the seminars conducted by the PRO for Central American universities in the sixties and seventies and wanted to develop a national admissions test to improve the quality of higher education. Unfortunately, the political environment and the existing laws requiring open admissions to the universities were not favorable for such a project. After five days of meetings, we recommended that these educators develop a test to evaluate abilities and achievement in basic subjects at the end of secondary education that after a few years could be used for admissions. Upon returning to Puerto Rico, we sent

the Council a complete plan to set up a test development office at the Council, describing the staff positions and the technology resources needed for an efficient operation.

Our psychometrician and Director of Test Development, Antonio Magriñá, was also active in conducting technical assistance workshops in Latin America. Tony had become well known through his presentations in Mexico and Puerto Rico. In September 1996, he presented a commissioned paper on equating at the Conference of Iberoamerican Ministers of Education and conducted a five-day course on the same topic for evaluation specialists from Argentina. He was later invited to provide a similar workshop for staff at the evaluation division in Mexico's Department of Public Education (SEP) and went a second time the following year as a consultant to audit equating work conducted there.

Continued growth and extension of services to new countries.

The Second Five-Year Plan brought new impetus to our activities in Latin America as we consolidated our presence in Mexico and began looking forward to expanding services to other countries and with several programs. The PROLAA became the Puerto Rico and Latin America Office, and the Trustees approved our request to add members from Latin America to our Advisory Panel. The market study in Mexico predicted good opportunities for English language assessments, guidance, and occupational counseling instruments, and for the PIENSE tests in the private schools. In 1999, a separate unit was established to coordinate operations, customer service, and marketing in the region. The Guidance Inventory CEPA was ready, and ELASH would soon be.

One of the first issues considered was how to manage the expected expansion of services. It soon became clear to us that it would not be possible to continue servicing directly each university and school individually without a large staff, which would make the operation expensive. We had to explore other alternatives. The opportunity came in 1999 when the *Universidad del Valle de Guatemala* (UdVG) contacted the Office about using the PAA and to explore reestablishing the collaboration that had existed in the seventies (See Part II). This private Guatemalan university continued to offer graduate studies in measurement and evaluation and operated an Educational Research and Evaluation Center which provided services to the national school system as well as to private schools and universities. Having heard of our success in Mexico, they wanted to represent and sell the PRLAO programs in Guatemala much as they did with tests from other companies. This was a novel proposition that looked too much like a purely business arrangement for our liking. Instead we proposed that we jointly establish a PRLAO test center in Guatemala. They would register the students, distribute the test materials, and supervise their administration. We would pay a fee for these services on a per-student basis. We agreed to do this experimentally for one year, after which we would evaluate and decide its future course. When the time came, we had to increase the initial fee so that the center could cover its direct costs and overhead.

By 2005, the Center in Guatemala was administering the PAA, PIENSE, CEPA, and ELASH to over 6,000 students in five universities and 26 schools. The same arrangement was made in Bolivia with the *Universidad Privada de Bolivia*, which had been using the PAA and PIENSE for several years. A variation of this concept was implemented in Guadalajara with an association of private schools (AJIEMS) and with the Legionnaires of Christ educational services who serve their schools and others throughout Mexico. These special arrangements allowed us to expand our services without adding much staff time for distribution of test materials, supervision of testing, and customer service. After intensive training, only two short visits per year were needed to audit the operation and update the staff. In one of those visits, we normally had a meeting with all the schools and institutions receiving services.

In September 2004, the PRLAO signed an agreement with the *Universidad Tecnológica de Panamá* to provide the PAA, ELASH, and a Mathematics achievement test to support the admissions process of this public institution specializing in engineering and technology. The Technological University had been established by the Panamá government with the purpose of elevating the quality of these professions to an international level. It was a selective state-supported institution where many of the engineering faculty sought a climate for serious teaching and research not present at the traditional National University. At their request, a special Math test was developed because they found that the Math Achievement Test used in Puerto Rico did not provide sufficient information. The ELASH tests were administered to establish a benchmark and send a message to the students that English was necessary in their profession.

After the 1995 visit sponsored by the U.S. State Department, we never heard much from Honduras until September 2005. Dr. Norma Reyes de Martin, whom I had met in 1995, was now executive director of a commission appointed

by Honduras's congress to reform the National Autonomous University, and she contacted the PRLAO to request our assistance in setting up an admissions and registrar office and to administer the PAA. Over the phone she sounded excited that finally they would have an adequate admissions system. I had already announced my retirement and was in the process of tying up my 18 years at the College Board, but she insisted on visiting Puerto Rico the following week to discuss the project with us. She visited Puerto Rico and presented a fast-track project that no one in the Office considered possible. She wanted to administer the PAA in January, and we had to convince her that this was not viable. There was no admissions office and the existing admissions process was inefficient and open to all sorts of improper influences. We had arranged for her to meet with the University of Puerto Rico System's Director of Admissions and with the Río Piedras Campus Registrar, and before leaving, Dr. Martin had invited the two of them to join Janning Estrada and me in a consulting visit to Honduras in November. Since at that time I would be already retired, Fred Dietrich arranged for me to stay as adviser to the Board in several projects including this one. The four of us worked very hard, encouraged by the enthusiasm of the reformers, and in spite of many difficulties, the university was able to establish an adequate admissions process and used the PAA as their admissions test. I cannot help but think that supporting Honduras's reform of its National University was a fitting end to my career at the College Board.

These years also saw several important projects in support of the upper secondary school systems operated by the universities of Guadalajara, Nuevo León, and Coahuila. The project in Guadalajara was aimed at increasing the opportunities of underrepresented students from the university's *preparatorias* to be admitted to college by improving their verbal and mathematical reasoning abilities. Two PRLAO specialists trained 200 teachers to develop and conduct a 40-hour course focused on higher verbal and reading skills and mathematical reasoning. The students were to be tested with a pre-PAA test before the course and with another form of the test after the course. The results were encouraging. Projects with a similar population were conducted in Coahuila and Nuevo León using CEPA and developing instruction based on the information the projects provided. Janning Estrada conducted workshops for school counselors to develop counseling programs to reach students.

The financial impact of 18 years of growth in Latin America. From 1987-88 to 2004-05, we were able to restore our presence in Latin America, and our services in the region increased substantially and diversified. This was the result of strategic planning and an inordinate amount of work by those on the staff directly involved with Latin American operations. Behind this dedication was the conviction that increasing services in Latin America was an extension of the College Board's mission and necessary for the well-being of the Office. In 1987-88, Latin American activities were limited to six institutions of higher learning and three scholarship organizations that used 16,181 PAA admissions tests and 1,500 ESLATS for a total test volume of 19,635. Income from these tests was approximately \$100,000. In 2004-05, the PRLAO was serving 141 higher education campuses and over 600 private and public schools in eight countries. These schools and institutions administered 210,733 PAAs, 92,387 PIENSE II batteries, 36,269 CEPA Guidance Inventories, 6,828 Pre-PAAs, and 17,575 ELASH assessments, for a test volume total of 367,015. Revenues from Latin America were a little over three million dollars which amounted to 33% of the total PRLAO income.

I. In Retropect.

As I look back at these 18 years at the helm of the Puerto Rico and Latin America Office, it is fitting to interpret what it was all about beyond the tests we developed, administered, scored, and reported. These were of course central, but they were not ends in themselves. They were instruments to support students, schools, and institutions in their pursuit of educational excellence. Thus, we provided a diversity of educational services, tests included, and we did this in distinct environments that presented different challenges. We provided technical assistance and information to support recruitment, admissions, placement, and institutional evaluation; we offered information and instruments for guidance, and in-service training to support career exploration, academic planning, college choice, and preparation for tests; we also prepared curriculum materials for teachers and students, and sponsored conferences, meetings and seminars to examine relevant education issues, consider best practices, discuss research, and build consensus. And we created budgets, marketed programs, and managed people, not as an end in themselves but because they were needed to fulfill our mission.

Among the major accomplishments, some stand out as the most meaningful to me as a professional and a human being. One is that we were able not only to achieve self-sufficiency but to contribute our share and more to the finances of the whole organization. Another is that we were able to renew the original programs and develop new ones to advance the College Board's mission and serve education in Puerto Rico, obtaining for the organization wide

recognition in the educational community and society in general. We supported reformers of the state universities in México, Panamá, and Honduras with College Board tests and experience and helped make admissions transparent and fair for all students. And then there is the most meaningful accomplishment of all: Bringing together a team of wonderful and dedicated people to achieve success and develop the wisdom to handle change while maintaining the continuity that allows individuals and their institutions to transcend limits of time and circumstance.

