

PRIMARY EDUCATION SUPPORT PROJECT (PESP)

(JA-0059)

EXECUTIVE SUMMARY

Borrower:	Government of Jamaica (GOJ)		
Executing agency:	Ministry of Education and Culture (MOEC)		
Amount and Source:	IDB:	US\$	31.5 million (OC/IFF)
	Local:	US\$	8.0 million
	Total:	US\$	39.5 million
Financial terms and conditions:	Amortization Period:	25	years
	Disbursement Period:	5	years
	Interest Rate:	Variable	
	Supervision and Inspection:	1.0	%
	Credit Fee:	0.75	%
	Currency:	US\$ from the single currency facility	
Objectives:	<p>The goal of the project is to contribute to the improved performance, efficiency, and equity of the primary education system. The strategic objectives of the project aim to: (a) improve performance through the effective implementation of the revised primary-school curriculum and national assessment standards in all primary schools; (b) increase efficiency through the rationalization of teacher education and the strengthening of educational management capacity at all levels; and (c) enhance equity in the delivery of educational services to children from lower socioeconomic backgrounds, who are at the margin of both equity and achievement.</p>		
Description:	<p>The project is organized into three articulated components:</p> <ol style="list-style-type: none">1. <u>Quality assurance</u> (US\$10.0 million). This component will support improved literacy and equity by providing resources to: (a) implement the revised primary education curriculum in all 876 primary schools in Jamaica, and train an estimated 10,000 teachers including 1,000 school principals in its use; (b) supply textbooks and supplementary materials to support the new curriculum; (c) implement a targeted literacy enhancement program in 80 low-performing primary schools; (d) strengthen the Student Assessment Unit, and standardize continuous assessment in all primary		

schools; (e) **model dynamic methods of teaching and learning** including programmed learning, interactive radio, and information technology; (f) **reform teacher education and rationalize its delivery**.

2. **Institutional development** (US\$9.3 million). This component will finance actions for organizational development, increased efficiency, and a more effective system-wide decentralization, including: (a) two **pilot school districts** to model new policy for resource management and teacher redeployment; (b) a **leadership diploma program** all 876 primary-school principals; (c) training programs related to succession planning, leadership development, and **strengthened MOEC institutional management**; (d) **management training to strengthened MOEC Regional Offices**; (e) construction of an integrated **educational management information system**; (f) **site-based management and governance** activities; (g) community-school partnerships in 100 schools to increase **school attendance**; and (h) specific measures to improve **efficiency**.
3. **Civil Works** (US\$10.5 million). This component will finance: (a) **construction, furnishing, and equipping of approximately 11 primary and All Age schools** of which five will be replacements or partial replacements of existing buildings, four will be expansions of existing schools, and two will be new schools. Approximately 4,965 student places will be provided; and (b) the establishment of a detailed inventory and **school maintenance data base**.

Bank's country and sector strategy:

The PESP is consistent with the Bank's lending strategy for Jamaica, which includes support for improved social sector performance. In this context, the proposed operation targets increased equity in the delivery of educational services and opportunities, increased efficiency in sector management, and increased relevance throughout the system.

Environmental/Social review:

Component 3 will require the construction of two new and three replacement schools, and the extension and partial replacement of approximately five other schools. A land survey to be conducted as part of the siting exercise, will assess potential environmental impact in determining specific works; review local environmental norms and legislation to ensure that all construction-related activities meet Bank environmental requirements; and if necessary, identify complementary provisions which ensure that areas with high environmental sensitivity or incompatible land uses are excluded. All new construction will be carried out in accordance with the norms established by the Technical Services

Unit of MOEC and inspected by a qualified engineer, taking into account Bank requirements; prior to acceptance by the education authorities. No adverse long-term environmental impact is envisaged.

As part of its effort to identify and address social and gender issues, MOEC will enlist the full and active participation of stakeholders in the review and development of all learning resources to be delivered through the project. The project will mitigate the negative impact of the inequitable distribution of primary-school places through the targeted expansion of coverage. It will further strengthen the delivery of quality education in disadvantaged areas through the reinvestment of cost-savings into targeted intervention programs. Measures to reform teacher education will focus on upgrading the skills of the teaching corps, and integrating strategies for conflict resolution, guidance, and counseling. This is considered critical in the context of the high-level of violence that exists in Jamaica. The primary beneficiaries of qualitative improvement and quantitative expansion are those from lower socioeconomic backgrounds who are at the margin of both equity and achievement.

Benefits:

Social equity and quality. One of the main elements driving the design of the project has been the need to ensure that all the proposed actions contribute to improved equity and performance throughout the primary education system. In infrastructure, for instance, all of the proposed investments are targeted to poor areas; and the incremental resources for maintenance will address the most pressing needs in terms of repairs and equipment replacement, which tend to be much more serious in rural and depressed urban areas. With respect to quality improvements, all primary students and their teachers will benefit from the effective implementation of the new curriculum, the provision of relevant teaching and learning resources, and the use of continuous assessment for improved instruction. In addition, 80 of the most disadvantaged schools will be targeted for a special literacy intervention program, aimed at improving learning outcomes for children up to Grade 4 in these schools. The agreement to gradually reduce the proportion of uncertified teachers in the system, most of them concentrated in the poor urban and rural areas, from the current 20% to under 5% by 2005/06; together with the re-introduction of incentives for qualified teachers to work in disadvantaged schools, are also expected to significantly contribute to achieving a more equitable allocation of human and financial resources at the primary level. On the institutional side, the establishment of school districts will allow for the re-deployment of teachers and a more equitable distribution of resources among schools. Finally, the proposed interventions in

the area of school attendance are expected to contribute to the alleviation a serious problem currently affecting the poorest

children in the system, especially boys. Performance indicators to measure social equity enhancement and system performance have been included in the Monitoring and Evaluation Plan.

Increased efficiency resulting from improved financial and human resources management, based on recommendations and actions contained in the project, are critical over the next years, to implement new policies for improving and sustaining quality and equity in the system. It is expected that the cost savings originated in the project will be primarily reinvested in policy initiatives, including certification of pre-trained teachers; the maintenance of buildings, with direct benefits on schools that attend students coming from low-income families; and in strengthened school management at the district and regional levels. The rationalization program of Teachers' Colleges will produce savings that could be used to expand community-based professional development activities that will be accessible to the teaching force in rural and remote areas. Teachers, particularly women, in communities distant from teacher training institutions, that today find it very difficult to access professional development programs, will start to receive continuous training in evenings and/or weekends very close to their school locations and homes. Cost savings will also help to re-institute incentives that attract qualified teachers to teach in schools located in remote and disadvantaged areas.

Improved Educational Management Information Systems (EMIS) are expected to result in a better informed decision making process as an outcome of more accurate and current data for planning and monitoring; a more efficient resource management system due to rationalization of procedures, increased productivity, and enhanced integration between MOEC and the Regional District Offices; and improved capacity to quickly and reliably generate statistics; the integration of technology information pockets within the MOEC; (and the development of a long-term vision for the application of information technologies in the management of Jamaica's education system. The end result will be a more efficient allocation of scarce resources.

Risks:

Project execution. The complexity of the project, as well as the delays that occurred in the execution of the previous project, were recognized as the main implementation risks for the new project. The MOEC will use a different approach to project execution than that used under the earlier operation. In the new scheme, a reduced management unit will focus on management functions, and advise the involvement of MOEC technical units in the design, execution, and monitoring of the components. MOEC offices will have full responsibility for the execution of the project. As a consequence, technical performance and accountability will be spread over the whole Ministry, instead of being concentrated in a separate unit. The establishment of a steering committee chaired by the Permanent Secretary, three sub-committees for specific areas chaired by MOEC heads of department, and the positioning of technical coordinators in the Project Management Unit (PMU), will further ensure the integration of technical inputs. The institutional strengthening of MOEC staff and new EMIS will support a deeper involvement by MOEC in activity management and results monitoring.

In the previous operation, implementation delays and cost overruns occurred mostly in the civil works component. These causes were analyzed and addressed during project design as follows: (a) the size of the component in the new project is significantly smaller; (b) planning of civil works and procedures for contract management were anticipated; (c) complete designs and land issues will be resolved prior to any disbursement of the component; and (d) tendering documents and construction contracts for the first stage (60% approximately of the total cost of the component) will be completed and approved by the Bank in the first year of execution.

Financial risks. A potential problem for any project being implemented in a country undergoing the kinds of macroeconomic problems Jamaica is experiencing at the moment, is the risk of the government not being able to allocate sufficient counterpart resources to the project in a timely manner, or of not covering the incremental recurrent costs to be generated by its implementation. However, as mentioned in paragraph 4.1, the proposed operation was designed explicitly taking into account the need to minimize counterpart fund requirements, while the incremental recurrent costs that will be directly and indirectly generated by the project could be more than compensated by the potential cost and efficiency gains savings identified as part of the institutional analysis undertaken during project preparation.

Information systems. Possible risks identified in the area of information systems include: (a) a lack of high-level support implement EMIS actions; (b) inadequate technical support for the seamless operation of the system; (c) the potential loss of trained technical personnel in the future; and (d) delays related to the procurement of hardware and software. These risks will be mitigated through the filling of the post of Director of EMIS in MOEC; and the creation of a special sub-committee composed of top MOEC leadership to oversee the integration of all computer and telecommunications systems. In addition, the EMIS sustainability plan includes resources to attract and keep the skilled personnel necessary to operate the system, as well as support for training and monitoring activities throughout project implementation. Finally, the Bank, through its Regional Operations Support Offices for Procurement and Information Technology, can provide support to ensure adequate and expedient implementation of all required procurement procedures, including advice on the required technologies.

Special contractual clauses:

Conditions prior to first disbursement of the loan:

1. MOEC will present to the Bank evidence that: (a) the GOJ has approved the structure of the PMU; (b) appointed the PMU Coordinator; and (c) established special bank accounts exclusively for the resources of the financing and local counterpart (para. 3.4).
2. The definitive action plan for the first year of the project and the PESPI Implementation Manual (para. 3.16).

Condition prior for the disbursement of the civil works component:

1. MOEC shall present to the Bank the appropriate evidence of legal possession of land for the selected school sites, architectural/engineering designs, and tendering documents for Stage I of the civil works (para. 3.11, 3.12).

Poverty-targeting and social sector classification:

This operation qualifies as a social equity-enhancing project, as described in the indicative targets mandated by the Bank's Eighth Replenishment (Document AB-1704). Furthermore, this project qualifies as a Poverty Targeted Investment (para. 4.3). The borrowing country will be using the 10 percentage points in additional financing.

Exceptions to Bank policy:

None.

Procurement:

The limits over which international competitive bidding will be used for the procurement of this project are: US\$250,000 for goods and US\$1.5 million for civil works (para. 3.19). Prior review by the Bank will be required for all procurement documents for international competitive bidding. With respect to local competitive bidding, prior review of procurement documents by the Bank will be required for the acquisition of goods and services. Once PESP has demonstrated that effective procurement procedures have been established, local procurement will be further reviewed on an ex-post basis using Bank guidelines (para. 3.21).

I. FRAME OF REFERENCE

A. Introduction

- 1.1 Jamaica is committed to the universal delivery of quality basic education. Since independence in 1962, a strong investment program in school building has enabled the Government of Jamaica (GOJ) to achieve nearly universal coverage in Grades 1-9. Over the past 17 years, the Bank has contributed to this vision through two key investments in primary education. The first Primary Education Improvement Project, contributed to access objectives through a large school building program. The second Bank loan investment, while prioritizing school infrastructure, moved the system towards sector reform through the revision of curriculum, the introduction of a national assessment system, and the subsequent elimination of the common entrance examination. Given these considerable achievements, the GOJ has now turned its focus to improved sector performance, and has requested Bank support to explore cost-effective actions to improve quality, equity, and efficiency in primary education delivery.
- 1.2 The proposed Primary Education Support Project (PESP) aims to bring about wide-scale use of the new primary-education curriculum and assessment standards, and reform the way that teaching and learning proceeds. New management practices and systems at the central, regional, and school levels will result in improved sector efficiency, equity, and performance. Central to these changes are efforts to: (a) achieve major improvements in early literacy and numeracy, particularly among children in poor urban and rural communities; (b) strengthen the teaching profession; (c) build leadership and management capacity at all levels; and (d) enhance sector efficiency.
- 1.3 One of the main elements driving the design of the project has been the need to ensure that all the proposed actions contribute to improved equity and performance throughout the system. In Jamaica, as in other parts of the world, education is considered a vehicle for achieving higher productivity and social mobility. Equity can be improved by developing new criteria and methodologies for the distribution of resources among existing schools, and by improving coordination between all levels of the education system. To ensure the expected results, the project was designed within the context of a comprehensive sector-wide strategy that takes into account institutional reforms and policy actions. Cost savings generated by the project will be primarily reinvested in targeted policy initiatives to increase educational opportunities for children in poor and rural areas, who are in the margin of both equity and achievement.

B. Macroeconomic framework

- 1.4 Jamaica has been facing a deteriorating economic environment and performance since the mid-1990s. Recurrent large fiscal deficits during this period have resulted not only in high real domestic interest rates, economic stagnation, and worsening of portfolio problems in the financial sector, but have also led to a

dramatic increase in the level of public debt, now representing about 144% of Gross Domestic Product (GDP). As a consequence, the overall debt service burden on the budget has risen to an all-time high of 61.8% of total expenditures in FY 1999/2000.¹ Although in the past few years, the economy experienced a reduction in poverty rates (in large part due to real wage increases in both the public and the private sectors), high but stable unemployment levels and, in 1999, perhaps some modest growth,² continuing high real domestic interest rates, declining levels of outstanding credit to the private sector, and the prospect of large fiscal adjustments may keep the economy from experiencing the much hoped-for high levels of economic growth, at least in the short and medium term.

- 1.5 In recent years, Jamaica's economic policy emphasis has been on maintaining exchange rate stability and keeping inflation under control, through a combination of fiscal adjustment and tight monetary policy. This policy has thus far succeeded in stabilizing the exchange rate and lowering inflation from about 80% in the early 1990s to about 8.4% in FY 1999/00, although at a cost in terms of high (though gradually declining) real interest rates, larger interest payments on the ever-increasing domestic debt, and lower economic growth.
- 1.6 On the external side, the real appreciation of the Jamaican dollar experienced up to 1998/99 has eroded the country's international competitiveness. This, together with the recent deterioration of Jamaica's terms of trade, resulted in the widening of the current account deficit in FY 1999/00. The government, however, was still able to achieve its target for external funding through a combination of very successful sovereign bond issues in the European market and the forward sale of bauxite (one of the country's main traditional exports), which helped net international reserves reach record levels (over US\$ 700 million, or 12 weeks of import coverage) at the end of FY 1999/00.
- 1.7 On the fiscal side, the consolidated public sector deficit, at 11.7% of GDP in FY 1998/99, was reduced to 10.1% of GDP in 1999/00, and is expected to be cut by half this year, to about 5.2% of GDP in FY 2000/01. These actual and projected improvements are due to substantial increases in central government fiscal revenues over the past few years, given that expenditures have remained at about 35% of GDP since 1997/98. Apart from the central government deficit, a major factor explaining the growth in the public debt has been the Government of Jamaica intervention in the financial sector since 1997, in order to rescue troubled institutions. This bailout is estimated to have cost the GOJ the equivalent of about 40% of GDP. At present, more than half of all fiscal revenues and grants are being absorbed by public sector interest service obligations (21.5% of GDP), about 80% of which corresponds to domestic debt interest service.³ The impact that these interest service obligations is having on the budget is made clear by the

¹ The fiscal year (FY) runs from April 1 to March 31.

² Estimates are in the order of 0.0% to 0.4%, following an average annual decline of 1.5% between 1996 and 1998.

³ Although domestic debt (mostly denominated in Jamaican dollars) represents almost 70% of total outstanding public sector debt, it carries a much higher average interest rate (both in nominal and in real terms) than foreign debt, and its burden on the fiscal budget is thus proportionally higher than its share of total public sector debt.

fact that, without them, the FY 1999/00 central government budget turns a primary surplus of over 10% of GDP, one of the highest in the entire region.

- 1.8 Given the rigidities on the current expenditure budget (absorbed mostly by interest, wage and salary payments), the effort to curb fiscal expenditures in order to keep the fiscal deficit under control has fallen disproportionately on capital outlays and on spending in social and community services. This situation severely limits the ability of the government to channel significant additional resources to infrastructure investment and the provision of social services.
- 1.9 Taking into consideration the country's current economic difficulties, the proposed project, even though relatively modest in size, attempts to maximize its potential long-term impact on educational quality, institutional improvement, and sector efficiency, without generating significant incremental recurrent costs. Counterpart fund requirements for this operation, at US\$8 million over the five-year execution period, are rather small, representing US\$1.6 million per year (a marginal 0.36% of the overall education sector budget), and therefore are not likely to become a major problem during the project implementation period.

C. The education sector

1. Sector structure

- 1.10 Jamaica's education system consists of four levels: early childhood, primary, secondary, and tertiary. Six years of primary education is offered free of charge to children aged 6-11. In 1998/99, about 310,000 students were enrolled in Grades 1-6 in some 876 Primary, All Age, Primary & Junior highs, and private preparatory schools. Preparatory schools are private schools, which provide about 7% of the total primary enrollment. Approximately 6% of all public primary schools operate on shifts. The average student/teacher ratio of 32:1 is among the highest in the Caribbean. Secondary education consists of two cycles (grades 7-9, and grades 10-11), and is highly stratified by educational level and type of institution. Placement in secondary school is achieved through a selective examination taken at the end of primary school. Secondary Highs, which are attended by about 30% of the secondary cohort, are considered the most prestigious schools. These schools offer a seven-year program that includes five years of academic secondary and two years of post-secondary "A Levels", as required for entrance into the University of the West Indies (UWI). The remaining 70% of the secondary cohort are placed in various three and five year programs which combine basic subjects with technical and vocational skills development. Post-secondary programs are offered through an emergent network of Community Colleges, six Teachers' Colleges, two Universities, and the HEART Trust National Training Agency.

2. Sector finance

- 1.11 Total public educational expenditures in Jamaica absorb a relatively high share of GDP (5.8% in 2000/01, as compared to an average of 4.6% in Latin America and the Caribbean). This share has been gradually declining since FY 1997/98, then it represented an all-time high of 6.9% of GDP, as an increasing proportion of government resources were channeled to service rapidly growing debt obligations.
- 1.12 Despite these recent developments, during the past decade, education has remained among the most important sectors in terms of the government's budgetary allocations, with a share that has fluctuated between 25% and 27% of all non debt-related public expenditures. Over the past five years, about 35% of those resources have been allocated to the primary level; a further 33% went to secondary, 21% to tertiary, and the rest to early childhood, adult education, library services, and administration.
- 1.13 Diminishing enrollments⁴ since the mid-1980s and significant increases in public educational spending during much of the 1990s have resulted in considerable increases in real per-pupil expenditures at all levels. For instance, between 1991/92 and 1997/98 real per-student expenditures increased by 174% in primary and 154% in secondary, although they have been declining somewhat since the 1997/98 peak. For FY 2000/01, recurrent per-pupil budgeted expenditures are, on average, equivalent to US\$145 for early childhood, US\$480 for primary, US\$590 for secondary and US\$2,740 for tertiary education; although there is considerable variation within each level, depending on the type of educational institution.
- 1.14 During the past decade, over 91% of Ministry of Education and Culture (MOEC) expenditures have corresponded to recurrent costs, of which teacher salaries are by far the largest single item. The average share of capital expenditures for this period, at only about 9% of total spending, is a clear indication of the under-spending in the equipment and maintenance of physical facilities in the education sector. It is important to note that a very large increase in public recurrent expenditures for education took place starting in 1997/98, as a result of an agreement signed by the GOJ and the Jamaican Teachers Association in 1996. For instance, total MOEC recurrent expenditures jumped by 28% in real terms from 1996/97 to 1997/98. The fiscal crisis that affected Jamaica soon afterwards, resulted in a subsequent reduction in recurrent expenditures by 15% in real terms. Given the GOJ's current fiscal situation, it is expected that the education sector recurrent budget will remain fairly constant in real terms, over the next few years.
- 1.15 In 1997/98, approximately US\$37 was spent on each primary-school pupil from the recurrent budget, excluding salaries. Of this amount, about US\$8 per student was transferred directly to the schools for operating expenses, materials, and supplies. The balance of US\$29 per student was spent by the central MOEC for

⁴ Enrollment at the primary level, for instance, went from a high of 333,674 students in 1986/87, to a low of 293,863 in 1996/97, increasing to 308,702 in 1999/00. This latter level is expected to be roughly maintained for at least the next 6-7 years.

other activities such as library services, school feeding, electricity, and incentive grants. The outcome of these under-funded inputs is poor quality in relation to the goals and standards set for the sector.

3. Equity, performance, and quality

- 1.16 With a net enrollment rate of 93.3%, (1998/99), Jamaica has achieved near universal primary education. Nevertheless, budgetary constraints and a shortfall of quality inputs have combined to produce an education system that is unable to provide an acceptable level of literacy and numeracy across geographic and socio-economic groups. Jamaica's primary education system is in the process of evolving from the British colonial system. While the traditional system worked well to stream bright students into a limited number of secondary places, it did little to promote the educational efforts of the majority of the primary-school population. As a consequence, many children attending government primary schools fail to satisfy the learning standards established for the sector.
- 1.17 **Inequity** in the system is a reflection of differentiated access to schools with regard to physical learning environments, geographic location, instructional quality, student/teacher ratios; the distribution of trained teachers, and opportunities for promotion up the educational ladder. Significant disparities in the learning outcomes of children from different income groups suggest the existence of large inter-school and inter-regional variations, as well as an uneven distribution of learning opportunities and resources outside of the school. Untrained teachers are mostly concentrated in the least prestigious (All Age) schools, which are generally located in poor urban and rural areas. Children from wealthier households are over-represented in the better educational institutions. In government schools, performance problems are often rooted in economically depressed urban and rural areas, where the need for physical rehabilitation is the greatest. Urban schools generally have better facilities and higher achievement than rural schools. The project will enhance equity through targeted policy actions including the reintroduction of incentives for qualified teachers going into rural or disadvantaged schools; a tighter enforcement of existing regulations, particularly in areas related to the hiring and retention of untrained teachers; increased budgetary allocations for school maintenance activities; and special interventions aimed at the most serious literacy, numeracy, attendance, and infrastructure concerns.
- 1.18 A number of recent studies supported by the MOEC, including an IDB-funded analysis of education policy and financing in Jamaica (1998), have identified deficiencies, which contribute to the sub-standard **performance** of many students in government primary schools, and to those students located in disadvantaged areas in particular. This body of research concludes that underachievement is highly correlated with the low level of key inputs, the unsatisfactory nature of existing teaching practice, and instructional strategies held over from colonial times. **Barriers to the delivery of quality education** include the lack of curriculum relevance and generalized assessment standards, the influx of pre-trained

(uncertified) teachers, the prevalence of teacher-centered pedagogy, insufficient teaching and learning resources, deteriorated learning environments, weak inspection and supervision, inadequate information management and tracking systems, and a highly centralized institutional structure.

- 1.19 It is widely recognized that the structure of Jamaica's education system is inconsistent with national needs and economic goals, in the context of an increasingly technological and service-oriented economy. More and more, workers in Jamaica must compete with workers throughout the region, in a global economy that places a premium on strong basic skills and the ability to pursue lifelong learning. Over the past decade, with the financial support of the Bank and other international agencies, MOEC has begun to address these concerns through targeted investments to improve primary and secondary education.
- 1.20 **Literacy.** One of the fundamental problems facing the Jamaican education system is the failure of a large percentage of children, primarily from low economically and socially disadvantaged groups, to achieve basic literacy and numeracy skills by the end of 4th grade. The results of the Mico Diagnostic Reading Test, for example, indicate that the median level of performance for students in government primary schools was below their respective grade level in all six grades. The 1999 administration of the National Assessment Program further corroborates the failure of the system -- approximately 45% of the 4th Grade age cohort could not read even at the most basic level; and the literacy rate among Grade 6 completers was just over 40%.
- 1.21 The GOJ is committed to creating opportunities for all children to acquire basic literacy and numeracy skills by the end of Grade 4, and has put several programs in place for students in low-performing schools. Great Britain's Department for International Development (DfID) is supporting literacy interventions in 48 rural schools, and a United States Agency for International Development (USAID) grant is training site-based literacy and numeracy resource teachers in 72 rural schools. In 1999, MOEC piloted a summer literacy program for students who failed the 4th grade basic literacy test. The proposed project will contribute resources to the targeted expansion of a national literacy program.
- 1.22 **Curriculum.** Under the second IDB-funded Primary Education Improvement Program (PEIP II, 1992-1999), the primary-education curriculum (which had been in place for more than 20 years) was revised. An extensive participatory process was used to evaluate subject-matter relevance, and to seek stakeholder views on the content and methodology of the proposed reform. The resulting curriculum shifted from a traditional teacher-led subject-oriented structure, to an integrated/thematic approach in Grades 1-3, and to a more student-centered methodology at all levels. The new curriculum covers all areas to be taught in primary school. It was piloted in 30 schools, and revised to incorporate feedback from pupils, teachers, and specialists. By September 1999, the validation process was completed, and curriculum documents were published for Grades 1-6.

- 1.23 MOEC is currently considering options for introducing the new curriculum nationwide. The Curriculum Unit is responsible for generalizing the new program, beginning in 2000, and for supervising all primary-education teachers in its effective implementation. Through PESP, a significant training program and related materials will be put in place to ensure long-term sustainability.
- 1.24 **Student assessment.** One significant feature of the educational landscape for many years was the Common Entrance Examination (CEE), the results of which determined which students would be selected for placement in Secondary High schools. The CEE was all-important, and constituted 100% of the child's grade on leaving primary school. This heavy emphasis on a selection examination resulted in serious distortions to equity and to the instructional process in the upper grades, as teachers would concentrate on preparing "bright" students for the test, rather than on facilitating subject mastery among all students.
- 1.25 The National Assessment Programme (NAP) has been supported by Bank project funds since its inception, more than 10 years ago. A large portion of the overall effort of the NAP has focused on developing the Grade Six Achievement Test (GSAT), which replaced the CEE in 1999 as the tool for assigning children to secondary schools. The move from the CEE to the GSAT is the most significant accomplishment for the NAP. Unlike the CEE, the GSAT is curriculum-based, and thus restores valuable instructional time to the teachers and their students. The NAP has also developed standardized testing instruments for Grades 1, 3, and 4.
- 1.26 MOEC has recognized the importance of institutionalizing the functions of NAP, and has recently approved a proposal for merging its functions into the permanent Ministry structure, beginning in 2000. This will require an overall strengthening of MOEC personnel and capacity building. It will also require the introduction of processes for the continuous review and revision of assessment procedures, particularly to accommodate the revised primary curriculum, as well as the nation-wide training of primary teachers in the use of continuous student assessment for instructional purposes. Support for MOEC institutionalization of NAP, the development of a system of continuous assessment, and its implementation throughout the primary school system will be financed with project resources.
- 1.27 **Teaching and learning resources.** Teaching and Learning resources are an integral part of the instructional goal. Good teaching materials not only guide new or weak teachers, but also help them to implement the curriculum effectively. They also have a positive correlation with student performance, particularly among children from lower income families, where access to reading materials may be limited in the home or community environments.
- 1.28 Since the 1960's Jamaica has provided free textbooks, developed for the Jamaican context and printed on newsprint, to all primary school children. The quality of the printing is low, however, and much of the content is outdated. Recognizing

the importance of books as a necessary ingredient in student achievement, various recent projects, including PEIP II, have focused on increasing the availability of library books in schools from 2.7 to 3.5 per child. Nonetheless, book life is unacceptably short due to the lack of suitable storage space.

- 1.29 The revised primary curriculum has fundamentally changed the scope, methodologies, and teacher competencies in grades 1-3. To be effectively implemented, it will require an array of teaching and learning resources, which are linked to the curriculum and of interest to the students. PESP will facilitate the development, procurement, and distribution of relevant instructional materials.
- 1.30 **School attendance.** Absenteeism is a serious problem in Jamaica, particularly among boys. Although mean attendance rates rose from 70% in 1990-91 to 76% by 1998, irregular student attendance constrains system efficiency and effectiveness. The Absenteeism Study⁵ undertaken by PEIP II, identified numerous contributing causes for low participation, including: irregular teacher attendance, poor enforcement/monitoring, parental attitudes, transportation, Monday/Friday activities such as market day, deteriorated school plants, and lack of curricular relevance. It also identified economic barriers to the regular participation of students from poor households (costs for school uniforms, lunch, transportation, supplies, etc.). Historically, Jamaica has attempted different approaches to improving student attendance, including a subsidized student lunch program. Nevertheless, absenteeism continues unabated. Given the rapidly changing dynamics in Jamaican schools, society, and the economy, PESP will reexamine root causes and solutions to absenteeism from a broad perspective (i.e., gender, service provision, subsidy targeting, monitoring and enforcement); and lend support to developing viable school- and community-based solutions.
- 1.31 **Teacher education** is delivered throughout Jamaica by a network of six Teacher Training Colleges; two Community Colleges; and the College of Agriculture, Science and Education. Post Diploma Degrees are offered through the Institute of Education at UWI. Training for vocational teachers is provided by the University of Technology. The Colleges, MOEC, and UWI have an institutionalized arrangement through the Joint Board of Teacher Education (JBTE) for curriculum development and the certification of teacher training programs.
- 1.32 As part of any package to improve the performance of primary education, the relevance and efficiency of teacher education must also be addressed. Studies as far back as 1991 have pointed to the need to restructure Jamaica's tertiary education system in general, and teacher education in particular. An analysis of internal efficiency of primary teacher education, undertaken during project preparation, showed that there is a needless duplication across institutions; low enrollment in a number of courses; and a sub-optimal utilization of human, physical, and financial resources system-wide. Fees charged by the Teachers' Colleges are equivalent to 10% of the unit cost; while UWI tuition is equal to

⁵ Interconsult. Absenteeism Study, Sweden, 1996.

15%-17% of the unit cost. Economically, it is not viable for nine colleges to be offering primary education diplomas with an annual output of approximately 500 graduates. The MOEC is aware of the need to increase the efficiency and cost-effectiveness of teacher education, and as a first step, has reduced the number of colleges offering primary education diplomas from nine to five, beginning in 2000. The PESP will provide resources to fully rationalize the system.

- 1.33 With regard to relevance, the subject-matter content and pedagogy delivered in Teachers' Colleges have not been reformed to meet the demands of the new primary-school program. Teachers' Colleges continue to emphasize traditional teaching methods. Most Lecturers do not hold advanced degrees, and are ill-prepared to meet, yet alone teach, the objectives of the new curriculum. Upon graduation, beginning teachers lack the basic skills and content knowledge required for effective instructional management. In 2000, MOEC will revise the course subject curriculum with USAID assistance. Additional support will be provided through PESP to develop a robust program for teachers' professional development as effective instructional managers.
- 1.34 **Teacher certification.** Students who would not otherwise have qualified to enter the University directly from secondary school, have long considered Teachers' College as a stepping stone to a full tertiary education. According to UNESCO's forecast for teacher supply and demand in Jamaica, the projected surplus for primary-level teachers will exceed 3000 by 2006. Despite this growing supply, the proportion of trained teachers public primary schools has actually declined, from 94.8% to 79.2% over the ten-year period ending 1998/99. The following chart summarizes teachers in Jamaican primary schools by qualifications.⁶

<u>Qualifications</u>	<u>Number</u>	<u>Percentage</u>
Trained Graduates	665	6.8%
Pre-trained Graduates	139	1.4%
Trained Teachers	7,124	72.4%
Pre-trained Teachers	1,911	19.4%

- 1.35 The influx of "pre-trained" teachers, who do not have Teachers' College preparation or certification, corresponds with a MOEC decision to cut back on the provision of requisite in-service training programs, during a period of prolonged

⁶ MOEC Educational Statistics, 1998/99. Educational Planning Division.

economic stagnation. Pre-trained teachers are significantly less expensive to hire than trained teachers, and do not require the same level of incentives for hardship posts. Given this, they are generally concentrated in All-Age Schools, which are located in the most geographically and economically disadvantaged areas. As a consequence, the percentage of untrained teachers in remote rural areas and in the poorest urban neighborhoods is even higher than the averages shown above. The practice of hiring pre-trained teachers has had serious ramifications for decreasing educational quality and equity in the system. The placement of untrained teachers with disadvantaged children, generates a strong inequity bias in the delivery of education, and contributes significantly to reduced standards of literacy and numeracy in these populations. Although existing regulations stipulate that pre-trained teachers must exit the system if they have not achieved certification within six years of being hired, compliance is low.

- 1.36 MOEC has recently initiated measures to improve its management of policy mandates in order to reverse the trend of increasing numbers of untrained teachers in the system, and to restore the level of certified teachers back to the 95% level by 2005/06. With the support of the DfID, MOEC is investing in the extension of opportunities for teacher certification via distance education. While this intervention will develop the methodology and modules for in-service certification, it will not provide the resources to close the gap referenced above.
- 1.37 As part of the effort to improve primary education, the proposed loan will assist MOEC to develop and implement a comprehensive strategy for rationalizing and reforming teacher education within the context of strengthening the delivery and efficiency of tertiary education. Resources attained through improved efficiencies would be targeted to extend community-based professional development to teachers in distant communities, who today find it difficult to access long-term training programs; to introduce a salary structure that has appropriate incentives to attract and retain qualified teachers in remote and rural areas; and to monitor the enforcement of existing regulations.

4. Institutional management and efficiency

- 1.38 **Human resource management and administration.** Efficiency and equity in the education system are affected by the manner in which teachers are deployed. The staffing pattern at schools is determined by MOEC, based upon enrollment capacity. Once allocated, the positions come under the jurisdiction of the school board. Currently, teachers have practically lifetime guarantees that they will be in a school for their entire career. Because teachers are employed under a permanent contract with the school board, they are exempt from MOEC redeployment. Over time, as enrollments increase or decrease, it is almost impossible to redeploy teachers to other schools in order to accommodate enrollment fluctuations. Understandably, in zones of high out-migration, where enrollments are significantly below the national average, school boards are reluctant to transfer-out positions, since the funds they receive are, in part, dependent upon maintaining their staffing pattern.

- 1.39 Consequently, many small rural schools are overstaffed with low student/teacher ratios, and large urban schools have unacceptably high enrollments. At the same time, there are more and more untrained teachers in the system. The serious shortcomings in **teacher deployment** policy have resulted in a very inefficient and inequitable use of human resources. Most understaffed schools, and most schools with a higher than average representation of uncertified teachers, are located in the poorest communities of the country. Support for teacher certification and teacher redeployment policy will be provided through PESP.
- 1.40 Another serious deficiency lies in the area of **teacher and principal leaves**. Currently, permanent teachers are eligible for one term of paid leave after five years of service, accumulated up to a total of two consecutive terms of paid leave after ten years of service. Principals with four years of service are entitled to one term of leave accumulated up to or a total of two consecutive terms of paid leave after eight years of service. The leaves are in addition to regular school holidays, annual vacation, and paid study leaves. The very generous leave policies result in serious financial inefficiencies and recurrent cost overruns in the system.
- 1.41 In the not-too-distant future, many of the Middle and Senior Managers in the Ministry will be retiring. This will leave a serious gap in institutional memory and sector management at the highest level of magnitude. **Succession planning** has lapsed in the decade of the 1990's, and there is not a well-trained pool of managers to succeed to a higher level of responsibility. The project will support institutionalization of a successful succession planning process in MOEC's human resource management practice.
- 1.42 **Education Management Information Systems (EMIS)** are currently not supporting good and reliable management practices. The lack of timely, accurate and relevant information is a serious impediment to sound planning. With the exception of the NAP, existing information systems in the Ministry have not been upgraded for seven years, and are operating without any connection among them. Several databases are found in the Ministry, some very mature, but simply not integrated among themselves, nor linked to the Regional Offices, or to the schools. One of the most important databases is the Annual School Census, which resides in the Planning and Development Division of MOEC. Due to the importance of this information, it would be ideal that it be shared, through electronic media, with stakeholders in the educational process, in the country and abroad. The NAP database has no connectivity to the Regional Offices or to the schools. Registers on teacher training, teachers' leave, transfers, and the like, are generally considered inaccurate and incomplete. The national Human Resources Management Information System, coordinated by the Office of the Services Commission, requires extensive modification to its teacher database in order to meet MOEC requirements for timely access to credible personnel records. Consolidated facilities infrastructure information is not available in electronic form, severely limiting the Ministry's capacity to plan and budget proactively.

- 1.43 **Inadequate management information systems impact directly on MOEC financial management.** Too often, senior managers are required to make decisions without, or with old, information. Further, the Financial Management division does not recognize the provision of current budget management reports to budget managers as its responsibility, resulting in a serious duplication of effort throughout MOEC. The absence of an effective central procurement unit for most goods and services, and the lack of integration between the purchasing and accounting functions contribute to a wasteful, inefficient use of resources. PESP resources will support the development and integration of MOEC databases and procurement practice for a more efficient and effective sector administration.
- 1.44 **Sector governance and management.** A major initiative over the last eight years has been the establishment of six regional offices in order to devolve oversight of the schools closer to the point-of-service. Each Regional Office is responsible for ensuring the delivery of quality education by some 200 primary and secondary schools in its jurisdiction, as well as the coordination of school supervision, educational support services, facilities management and maintenance, and administrative and personnel services. The PESP will support the continued devolution of responsibilities for site-based in-service training, monitoring and evaluation, and financial management to the regional offices.
- 1.45 Every primary school has its own **school board**, and is governed by the board, the principal, and a few other representatives. The Minister of Education appoints public school boards. The funding of schools is primarily based on the number and seniority of teachers. In addition, small resource grants are given to schools on a per capita basis. Many schools are close to neighboring schools and unnecessarily duplicate functions--especially when both have empty seats. In many cases, boards operate inefficiently because board members lack training and are only nominal attendants. In those instances, the principal frequently becomes both administrator and governor. Principals are not treated as managers, and do not participate in collective bargaining. Local school boards employ teachers and school principals, but do not establish teachers' salaries. School boards do not intervene in promotions, rewards, or sanctions for good or poor performance.
- 1.46 Primary schools in Jamaica are managed in a very traditional way: teachers lecture, principals function as bureaucrats, and routines govern the day to day operation and culture of the schools. While a number of principals now hold undergraduate degrees, there is a serious lack of educational leadership, and poor management practices proliferate. Many principals have little or no understanding of supervisory and evaluation practices. Consequently, many teachers are unsupervised or poorly supervised. New functions of leadership under a more devolved system will require specialized training and upgrading during a Principal's career. The Ministry is committed to developing a critical mass of school leadership, and is considering a national policy that would facilitate the development of a cadre of trained leaders at the principals' level. Resources to implement this policy, and to innovate new models of school governance, organization, and resource management are included in the PESP.

5. Infrastructure and maintenance

- 1.47 Jamaica has experienced a shift of population in response to perceived employment opportunities in the urban centers and tourism growth areas. These population dynamics, combined with a lack of flexibility in teacher deployment and shortcomings in infrastructure management, have put existing primary facilities under severe pressure in specific parts of the country where capacity is grossly inadequate in relation to demand. The project will support a targeted investment in new schools and major extensions to existing schools, which address severe overcrowding and access issues.
- 1.48 The physical facilities of many Jamaican primary schools are unsatisfactory for both students and teachers. Many schools are in dilapidated condition, with leaking roofs, serious termite infestation, overcrowding, unsanitary facilities, and inadequate play space. A large number of schools have very poor ventilation and lighting, which further exacerbates the problem of effective learning in the primary system. Although Jamaica's education sector has traditionally benefited from relatively high levels of community involvement in the routine maintenance and minor repairs of school buildings, as well as from contributions by the private sector and from public programs such as the Jamaica Social Investment Fund (JSIF), these have been small and sporadic relative to the needs.
- 1.49 MOEC budgetary resources for essential school infrastructure maintenance is inadequate to service the needs of the system. From FY 1989/90 to FY 1997/98, the budgetary allocation for primary school maintenance averaged only about J\$73.8 million per year in constant Jamaican dollars of 2000 (about US\$1.75 million), to cover all major building and equipment maintenance, repairs, and replacement for some 876 schools⁷. This allocation increased to an average of J\$375 million per year (in constant 2000 J\$, or about US\$ 9.0 million) in 1998/99 and 1999/00, when resources from the Commonwealth Debt Initiative (CDI) became available for this purpose. At this level, the total maintenance allocation came close to the annual minimum of US\$10.0 million, identified in the infrastructure study of the proposed operation, as necessary to begin dealing with the basic maintenance requirements of the sub-sector. However, because CDI resources were allocated for other purposes in the current 2000/01 FY, the budgetary allocation for maintenance has fallen to J\$239.4 million (US\$5.7 million), raising the serious prospect of rapidly returning to an inadequate level of commitment once external funding is no longer available.
- 1.50 The maintenance backlog originated by these low levels of budgetary allocations is enormous. According to the infrastructure study, over 50% of all primary schools are in need of serious repairs and refurbishment. At present, on-going periodic and preventive maintenance is almost non-existent, with only minor routine (mostly community-provided) maintenance and some emergency repairs

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During this period, MOEC resources for the maintenance of secondary schools were much higher, at J\$133.4 million in constant J\$ of 2000, or about US\$3.2 million, per year.

taking place from MOEC budgetary allocations. Unless more resources are allocated for school maintenance activities on a sustained basis, as the stock of infrastructure continues to age, these repair needs will continue to grow. This situation is worsened by the absence of a fully developed facilities management information system, so that there is no updated automated database to track the status of the school plant and equipment, a situation that prevents MOEC from effectively planning and prioritizing maintenance investments. Given the positive association between the provision of an enabling learning environment and student achievement, investment in school rehabilitation and maintenance is considered central to improve Jamaica's primary school system quality.

- 1.51 Recognizing the importance of further investment in primary school construction, replacement, and extension under this project, the Government has agreed to increase the FY 2000/01 maintenance budgetary allocation to J\$275 million (about US\$7.0 million). In addition, to ensure that in the future, more appropriate annual allocations for school maintenance activities are included in the Ministry's capital budget, specific maintenance allocation benchmarks will be monitored during project execution, so as to gradually reach an annual amount equivalent to the US\$10 million minimum required level by the end of the project.

D. The country's sector strategy

- 1.52 The actions proposed in the operation are fully consistent with the strategic objectives and performance targets expressed in the MOEC *Educational Policy Framework (1995-2000)*, the *MOEC Corporate Plan 2000-03*, and the Green Paper for the Year 2000, *Education: The Way Upward*. Strategic objectives for the sector include: a system which is performance driven, results oriented, and capable of delivering literacy for all.
- 1.53 In 1998, MOEC was one of three Government ministries to complete a *Strategic Performance Review*. The review, which was undertaken in association with Jamaica's Public Sector Modernization Program, was conducted with extensive stakeholder participation and the technical assistance of the DfID. The review highlights critical constraints that need to be overcome to achieve sustained performance improvements, and presents an action plan, which shows how the strategic objectives and minimum targets identified for the sector will be achieved. It advocates for the separation of strategic and operational functions; the provision of new instruments for educational management and planning; the adoption of a performance-management culture rather than a major restructuring; and the strengthening of MOEC capacity to deliver sound policy. In this respect, the review recommends amendments to existing legislation which, when combined with new patterns of resource allocation, could reflect improvements in equity, efficiency, and effectiveness.
- 1.54 As part of its commitment to improve sector efficiency, the MOEC has agreed, over the course of the loan, to: (a) reduce the overall percentage of pre-trained teachers in primary schools; (b) increase the annual budgetary allocation for

primary school maintenance; and (c) rationalize teacher education. Specific benchmarks to monitor progress have been agreed with the Bank and are included in the Evaluation and Monitoring Plan prepared for the project.

- 1.55 Cabinet has approved the recommendations of the Strategic Performance Review, and a high-level inter-ministerial Performance Management Team has been established to oversee its execution. Successful implementation of the recommendations will, however, require additional technical and financial resources, which will be financed in part, through the proposed operation.

E. The Bank's experience

- 1.56 The Bank's country strategy for Jamaica (1998) has, as an objective, improved social sector performance, including improved access, equity, and efficiency. In this context, the proposed operation supports the Bank's strategy through the establishment of policy initiatives and performance benchmarks targeting increased equity in the delivery of educational services, increased efficiency in sector management, and increased relevance throughout the system. The strategy is consistent with that of the GOJ's National Industrial Policy, the Medium-term Policy Framework, and the Public Sector Investment Programs, 1996/97-1999/00.
- 1.57 In September 1999, the Bank authorized the final disbursement under the US\$38.6 million PEIP II. Approved in 1992, PEIP II was the second of two Bank investments emphasizing primary education. Under this program, 18 primary schools were extended and refurbished, and eight dilapidated primary schools replaced. In addition, the schools' library service was strengthened, the primary-level curriculum revised, and the NAP established. Within the context of education and training, the Bank has also financed a US\$1.0 million grant to the Jamaica Computer Society Education Foundation to introduce computer-assisted instruction in 20 rural primary schools; a US\$324,000 grant to establish a research database to profile the developmental status of young Jamaican children upon entering primary school; US\$10 million under the Jamaican Social Investment Fund for poverty-targeted community development, including school rehabilitation; and a technical cooperation grant for US\$750,000 to conduct the technical studies required for the design and execution of this operation.
- 1.58 **Lessons learned.** The analysis of Bank investments in education over the past 10 years has identified four major issues related to project execution: (a) weak contract management; (b) redundant project execution models; (c) unrealistic project completion timelines; and (d) inadequate planning/integration. With regard to contract management, areas of concern include: design, cost, procurement, and quality assurance mechanism for civil works. In Jamaica, construction costs are high, which limits the number of critical infrastructure needs that Government can address. Cost over-runs on contracts and delays are frequent. To mitigate this situation, the loan will include appropriate measures, and support changes to the MOEC infrastructure project management policy which ensure the timely delivery of civil works.

- 1.59 To enhance project execution, MOEC will employ a streamlined model of project management, which is currently being used successfully in other investment projects. Under this model, management and coordination responsibility for the project will reside in a small Project Management Unit, and technical responsibility for execution will reside in the Ministry's technical units. Direct line unit involvement in all aspects of project execution, from design to delivery, will help to build MOEC technical capacity, consolidate MOEC ownership, and institutionalize lessons learned. The appointment of the Coordinator of the Project Management Unit as a condition for first disbursement will help to ensure a speedy transition from design to implementation. Finally, taking into account past delays produced by external constraints and unrealistic timelines, the Bank and the GOJ have agreed upon a five year execution period for this project.
- 1.60 An important lesson learned from Bank experience region-wide, is the importance of targeting investments within a comprehensive sector-wide strategy, in order to sustain expected outcomes. Institutional and policy frameworks were disregarded as points of reference for monitoring and evaluation, in the design of the previous Bank projects. As a consequence, maintenance expenditures in the school system haven't been associated with investments in infrastructure, and support for new curriculum and assessment standards was undermined by the recruitment of an enlarged number of unqualified teachers. The conceptualization of this operation is part of a sector-wide approach, which prioritizes equity and efficiency in budget allocations, and commits the government to have the required levels of quality in the teaching force.

F. Other donor activities

- 1.61 At the primary level, USAID is providing US\$13.6 million in grant funds through the New Horizons Project (1998-2004) to develop strategies to increase literacy and numeracy in 72 of the worse performing rural primary schools; and US\$500,000 to reform the core subject curriculum in Teachers' Colleges. Under the CDI, DfID is providing approximately £7.35 million in debt relief to improve the performance of 48 remote, rural schools through an integrated package of teacher training, teaching aids, and school rehabilitation. Additional £4.75 million in CDI funds were committed during 1999/00 to fund Stage I of a new All Age School Project. Under this project, mechanisms for the in-service training of uncertified teachers would be developed and piloted in 48 rural schools, expanding to an additional set of urban schools in a subsequent stage .
- 1.62 At the secondary level, the World Bank is supporting a US\$40.7 million program (1993-2000) to reform lower-secondary education and to improve infrastructure in 54 secondary schools. It is also sponsoring a US\$500,000 grant to assess the costs and benefits of CAI at the secondary and tertiary levels. The Japanese International Cooperation Agency is contributing US\$4.73 million to upgrade technical and vocational education and training in 14 Technical High Schools.

- 1.63 To ensure the efficient use of available resources in a context where several donors are involved, an intra-sectoral working group has been established by MOEC. The working group, which is chaired by the Minister of Education, includes other GOJ policy makers, as well as representatives from international organizations, the multilateral Banks, and bilateral donors. The objective of the working group is to facilitate program coordination and promote sector-wide planning on a long-term basis in support of government efforts for strengthening corporate and financial strategies in the education sector.
- 1.64 The proposed operation builds upon the Bank's substantial involvement in primary education in Jamaica, is articulated with other donor investment in the sector (as referenced above), and is fully consistent with the priorities expressed in the MOEC's educational policy framework and Strategic Performance Review, which focus on improved quality, social equity, and efficiency.

II. THE PROJECT

A. Project goal and objectives

- 2.1 The goal of the project is to contribute to the improved performance, efficiency, and equity of the primary education system. The strategic objectives of the project aim to: (a) **improve performance** through the effective implementation of the revised primary-school curriculum and national assessment standards in all primary schools; (b) **increase efficiency** through the rationalization of teacher education and the strengthening of educational management capacity at all levels; and (c) **enhance equity** in the delivery of educational services to children from lower socioeconomic backgrounds, through targeted interventions for improved literacy, numeracy, attendance, and civil works.

B. Project description

- 2.2 The estimated total cost of PESP is US\$39.5 million, including a Bank loan of US\$31.5 million. The project is organized into three articulated components: (a) **quality assurance**--for improved educational performance and equity; (b) **institutional development**--for improved sector management and efficiency; and (c) **civil works**--for school construction, expansion, and maintenance.
- 2.3 During project preparation, a comprehensive logical framework (Annex II-1) and a preliminary monitoring and evaluation plan were agreed with the Bank. The monitoring and evaluation plan presents a detailed time line for project execution and includes articulated implementation targets, key outputs, strategic benchmarks, and performance indicators, by component, for the first two years of project execution. Areas of potential efficiency have been included in the documentation, and benchmarks identified to guide the reinvestment of cost savings back into the education sector.

1. Component 1: Quality assurance (US\$10.0 million).

- 2.4 This component will bring about wide-scale use of the new primary school curriculum and student assessment protocol developed under PEIP II. Central to these reforms are efforts to achieve major improvements in literacy and numeracy, to rationalize and reform teacher education, and to model dynamic teaching methods within an action research framework

a) Curriculum (US\$1.5 million)

- 2.5 The curriculum sub-component will provide technical assistance, materials, equipment, and training to: (a) identify strategies and procedures for the formative evaluation and periodic revision of the new curriculum; (b) develop, and/or adapt, as appropriate, supplementary print materials supportive of the revised Grade 1-6 curriculum in general, and of the integrated Grade 1-3 program in particular; (c) develop and implement a dynamic, site-based training program and related training materials for the effective delivery of the new primary-school

curriculum; and (d) using the cascade model of training trainers, establish a network of 30 master trainers, and 120 regional training coordinators (senior teachers, Teachers' College lecturer, etc.), and at least one site-based pedagogical coordinator per school, to facilitate ongoing training, model best practice, and monitor curriculum implementation.

- 2.6 The phasing of curriculum implementation and the training of teachers in its effective delivery will begin with grades one and four, during the first year of project execution, to be followed sequentially with grades two and five during the second year of the project, and grades three and six during the third year. Over the life of the project, an estimated 10,000 primary school teachers including 1,000 principals and MOEC officers will benefit from the training.

b) Textbooks and supplementary materials (US\$ 600,000)

- 2.7 During the first year of project implementation, loan resources will facilitate improved book storage and a longer shelf life through the purchase and distribution of one steel cupboard to each of the 876 primary schools. Access to engaging reading materials will be supported through the purchase of 50,000 readers, and their distribution in lots of 100, to each of the approximately 500 primary schools not currently receiving USAID or DfID assistance. Bank resources will also provide expert technical assistance to: (a) assess the relevance of existing print materials to the new curriculum and to promoting gender equity; (b) identify a modern textbook series which fits with the revised program and is relevant to student interests; and (c) advise on the feasibility of a "book bank" scheme, providing guidelines for competitive bidding, and improved book distribution.

c) Literacy enhancement (US\$1.0 million)

- 2.8 During the first four years of the project, PESp will finance technical assistance, training, and materials to introduce a four-year literacy program in 80 low-performing urban schools, selecting the lowest 20% of students. The literacy program will complement the extension and adaptation of an array of successful interventions from USAID and DfID pilots in rural schools, as well as the expansion of MOEC's summer literacy program. A grant facility to provide resources for individual school initiatives will also be established following criteria agreed with the Bank.

d) Student assessment (US\$1.0 million)

- 2.9 This sub-component will provide technical assistance and financial support to: (a) build MOEC capacity for student assessment and standardized testing; (b) strengthen teachers' utilization of the performance-based continuous assessment standards to be developed by NAP for diagnosis, formative evaluation, and student grading; (c) align standardized achievement tests developed by NAP with the new curriculum, and implement in all primary schools.

- 2.10 Specific activities to be funded through the project include: (a) strengthening of the Student Assessment Unit within the MOEC; development of its capacity via an intensive program of technical assistance, training, and materials; and the establishment of two project posts within the Unit to facilitate institutional development. It is anticipated that the new posts will be funded with project funds during years 1-3, at which point, the posts will be established as permanent MOEC positions; (b) the review and alignment of assessment instruments developed by NAP, to the new curriculum; (c) development, validation, and implementation of a new Grade 3 diagnostic test; (d) development, validation, and distribution of standard grade books (8,000 per grade) and standardized continuous assessment procedures (3,000 manuals per grade) for marking student grades; (e) the development and delivery of an intensive training program in student assessment protocol for 30 master trainers and 4,500 school-based assessment coordinators; and (f) the development and production of training materials.

e) Teaching and learning resources (US\$2.0 million)

- 2.11 This sub-component will enable the MOEC to develop, document, and evaluate three innovative models of teaching and learning. Bank resources will finance national and international technical assistance, training, materials, and equipment related to the development, validation, and diffusion of the models. All three models will be developed in year one, and field-tested in different types of primary schools (including small rural multi-grade, larger All-Age, etc.) in year two. A national conference will be held in year three to review the outcomes of the three research projects, and to identify best practices for broad-scale dissemination, using local financing.
- 2.12 **Interactive radio mathematics.** Approximately 130 20-minute instructional programs utilizing audio cassettes for second grade mathematics and adapted to the Jamaican context, will be produced. A teachers' guide will be developed to facilitate teacher-led enrichment activities, and a one-day training program will be delivered to participating teachers. "**Windows on Literacy**" will support MOEC adaptation of an integrated instructional system for early literacy, and will rely heavily on the development and production of print materials to enhance children's reading and comprehension skills, and to guide teachers' interventions. A two-week training program will be developed and delivered as part of the field trial. The use of **Information Technology (IT)** will facilitate the development of successful, sustainable models for improved teaching at the primary-school level. The focus of the activity is to learn how to effectively utilize whatever kinds of computer capability schools may find themselves with during the coming years. The pilot will identify software, training, and an appropriate level of integration with the curriculum, in order to maximize the impact of each of these various configurations. A project post will be supported for three years within the Media Services Unit, to build the Ministry's capacity to lead and support the innovative use of IT in Jamaican primary schools.

f) Teacher education and professional development (US\$3.9 million)

- 2.13 This sub-component will contribute to significant changes in sub-sectoral organization, instructional management, and improved teaching quality. Activities to be funded include: (a) upgrading of skills and qualifications of Teachers College Lecturers; (b) development and implementation of a strategic plan to reform and rationalize teacher education; (c) in-service professional development and teacher certification; (d) establishment of demonstration school clusters to model effective teaching strategies within an action research framework.
- 2.14 **Teacher education, rationalization, and reform.** Loan resources and technical assistance will support: (a) the development of a strategic plan to rationalize and reform teacher education in the context of the overall restructuring of the sub-sector within the first six months of Project execution; (b) the appointment of a National Task Force, consisting of representatives from the MOEC, JBTE, the Jamaican Teachers' Association, and the Teachers' Colleges, to oversee the implementation of the plan; and (c) operationalization of the plan.
- 2.15 **Skills upgrading for Lecturers.** Over the life of the Project, the skills of all Lecturers in Teachers Colleges will be upgraded through a combination of short, medium, and long-term training. Seventy bonded⁸ graduate-level fellowships will be funded to upgrade Lecturers' skills in priority areas to be agreed with the Bank. Ten of the Fellowships will support Doctoral level study in overseas universities. The remaining 60 Fellowships will support Master's level training in Jamaica. The development and delivery of the training program will be open to international competitive bidding. A one-week program of site-based continuous professional development will be offered to all Lecturers on an annual basis (450 participants/year). Senior MOEC staff, principals, and senior teachers may, participate in the skills development program, as appropriate. All of these interventions will be compatible with the institutional and organizational changes to be adopted as a result of the previous sub-component.
- 2.16 **In-service professional development and teacher certification.** The development of an institutional strategy to restore and maintain the level of certified primary teachers at the 95% level by 2005, will require loan resources to: (a) update projections of training needs over the next 5-10 years; and (b) plan a targeted pre-service program; and (c) plan and deliver in-service training. It is expected that the cost savings originated through the rationalization of teacher education (para. 2.14) will be largely reinvested in re-qualification of the teaching force to achieve the 95% target, through the certification of pre-trained teachers under the Project. The annual schedule for the reduction in the number of uncertified teachers in the primary system to a level no greater than 5% of the teaching force by the end of the project implementation period is included in the logical framework (Annex II-1).

⁸ Bonding is a policy which requires the beneficiary of training to remain employed to the Ministry for a set period. The period or duration of the bond is linked to the value of the scholarship and could range from one to four years.

- 2.17 In addition to the challenges of teacher certification, MOEC is faced with an urgent need to provide in-service training related to the new curriculum and assessment standards, to more than 10,000 teachers including 1,000 school principals over the next four years. To facilitate the implementation of the professional development protocol, and the smooth integration of all PESP training activities, two four-year project-funded posts will be created in the professional development unit.
- 2.18 **Demonstration schools.** This sub-component will provide incentives for the establishment of demonstration schools to test new teaching methods. It will also enhance the capacity of the Teacher Colleges' to support school-based activities, conduct action research, and disseminate best practice. The sub-component will finance a beginning teacher and mentoring program, which would pair, on an annual basis, 500 new primary teachers with an experienced "mentor" in their primary school. Each pair would be eligible for training and a US\$100 incentive grant for instructional innovation. It will also establish a grant facility, equal to US\$125,000 over the life of the project, to support cooperative, school-improvement projects based upon the establishment of partnerships within the school, between the school and the community, or the school and the Teachers' College. Individual grants may not exceed US\$500 under this mechanism. The demonstration school pilot will begin in year one of the project and be evaluated in year three.
- 2.19 **Related studies.** The MOEC has recognized that the current incentive system for attracting qualified teachers to schools in remote and disadvantaged areas, is inadequate. During the first year of project implementation, this activity will fund a study to review the existing incentive structure and to identify appropriate measures, if any, to ensure the placement and retention of certified teachers in remote and disadvantaged schools. Appropriate measures will be agreed with the Bank during the second annual review. Another study to be funded through the project will assess the demand for and supply of Special Education in Jamaica's primary schools, and provide recommendations for action and improvement.

2. Component 2: Institutional development (US\$9.3 million)

- 2.20 Component 2 will support key recommendations in the Strategic Performance Review, including actions for the establishment of an organizational framework that will facilitate teacher redeployment, and activities that will improve management and efficiency through the organizational development of the MOEC, leadership training, and a more effective system-wide approach to decentralization and site-based management. It will finance the technical assistance, equipment, materials, and training related to the below eight lines of action.
- a) Pilot school districts**
- 2.21 The PESP will support a new policy for education management and teacher redeployment by the creation, on a pilot basis, of two new school districts, each to

include basic, primary, all-age and secondary schools. The goal of the pilot is to improve the efficiency and effectiveness of school governance, organization, and resource management. One district will be primarily urban and one primarily rural. Each district will encompass 25-30 existing schools that will be regrouped in a defined geographic area, serving up to 15,000 students. Teachers will be employed by the districts, making it possible for them to transfer to other schools where they are most needed without having to terminate their contracts; presenting, for the first time, the option of using economies of scale to provide additional services and enrichment opportunities of benefit to all stakeholders, and to target equity initiatives.

- 2.22 A District Educational Board, initially appointed by the Minister and given the authority to govern and manage its operations within the guidelines and policies of MOEC, will govern each of the districts. Teacher supervision will be provided by redeploying existing Education Officers to the school districts, while continuing to have them employed by the ministry. A Superintendent of Education employed by the Ministry (but located in the district office) will be responsible to guide the Education Board on education issues and district operations.
- 2.23 The pilot school districts will be established in the first year of project execution, and evaluated in year four. They will also provide specialized educational services like guidance counseling or special education. A district learning resource center will be established containing up-to-date learning materials, which teachers could borrow for a period of time. Other functions related to budgeting, payroll, procurement, accounting, and financial management will be provided, in part, by the reallocation of MOEC or Regional Office staff or resources, to the district.

b) Diploma program for school principals

- 2.24 The PESP will support the financing of a new diploma program focused on education and school management for 800 primary school Principals. The program will comprise five courses or modules of training in educational administration and leadership, the duration of each module to be 30 hours. All newly appointed principals will have to complete the diploma program within two years of appointment.
- 2.25 The diploma program will be conducted on weekends and during the summer over a twelve month period, with scholarship support for tuition, and a travel or accommodation allowance where required. These courses or modules would be provided in Jamaica by a university or a consortium of universities and, for approximately 100 bonded school Principals, through attendance for four months at an overseas university (supported by study leave and a scholarship). The university or the consortium offering these courses in Jamaica will be required to establish a relationship with a designated local Teachers College, with the intention of developing the capacity for continuation of the program without external assistance. The program provider will be expected to deliver the courses

in various locations throughout the nation, and will also be expected to develop distance education components within the courses or modules.

c) Strengthening MOEC institutional management

- 2.26 The PESP will support the succession process and leadership strengthening through three courses of action: mentorships, internships, and training programs, in addition to a small number of bonded off-shore study fellowships. Mentorship activities will involve senior employees working with junior employees to enhance the latter's skills. Internships will be a more formal placement of trainees with higher-level managers, as executive assistants, to assess the intern's skills and to determine whether a particular position would be a "good fit". Interns will be carefully selected and will normally be considered to have the qualification and training to become higher-level managers. Internships will be from three to six months duration.
- 2.27 The training program will consist of a series of eight formal workshops of nine hours each in eight major areas designed to improve the leadership and management skills of senior and middle managers in the Ministry. It will also include Regional Directors and Assistant Chief Education Officers. The training program will continue after completion of the PESP on an annual basis, to implement a strategy of continuous improvement of human resources and succession planning.
- 2.28 The PESP will finance, in addition, five bonded fellowships to provide for overseas doctoral level studies, and 30 short-term (one week) study fellowships to provide opportunities for managers to study effective and innovative practices in other educational organizations overseas.

d) Strengthening MOEC regional offices

- 2.29 In the year 2001, there will be approximately 72 managers and 66 middle managers employed in the Regional Offices, for a total of 138 employees in these two categories. The project will support management training over a two-year period for approximately 100 participants, who will receive a Certificate of Achievement in Educational Management. The training program will consist of eight courses of nine hours over a period of three weeks for each course with the participants divided in four groups of 25 each.
- 2.30 Current MOEC practices suggest that the processes of supervision and evaluation are not clearly understood and implemented by all Education Officers in the Regions. In particular, panel inspections will require substantial strengthening. A study will be undertaken under the PESP on current panel inspection activities at the Regional level, and recommendations for improvement in this important area of supervision and evaluation.

e) Educational Management Information Systems (EMIS)

- 2.31 The PESP will finance a new EMIS that will provide a coordinated technology effort, integrating the different information technology pockets of expertise found in MOEC and improving the integration between MOEC and the Regional Offices. The activities will be guided and supervised by an EMIS Steering Committee. The Director of EMIS within MOEC, will also coordinate all EMIS activities and actions financed under the project.
- 2.32 The project will finance the development of three new databases to allow for real time information management and control. The automation of the most relevant processes will include human resources, finances, and properties infrastructure data management. The project will also support the development of in-house maintenance and trouble shooting expertise. The development of the new databases will adhere to the criteria of Government-wide systems.
- 2.33 Activities financed through the EMIS sub-component include: (a) developing an *EMIS Connect* Web Site for the MOEC that will be deployed on the intranet and serve as the entry point for accessing information; (b) developing three web-enabled databases for personnel, finance and infrastructure; (c) integrating the NAP data base into *EMIS Connect*; and, (d) extending desktop access to *EMIS Connect*, administrative productivity tools, and other on-line information in the Central Ministry and Regional Offices. The sub-component includes a training plan and technical support needed to sustain EMIS. International and national consultants will be in charge of design and supervision activities, and will undertake specific studies to document the state of technology in Jamaica, and the availability of local expertise and technology support, including recommendations for new hardware, software, and consultant services for EMIS activities.

f) Site Based Management and Governance

- 2.34 PESP will finance the development of new models of school-based management in 12 "Lighthouse Schools". The Lighthouse Schools will empower teacher participation in collaborative school leadership, site management, instructional innovation, and decision making. The 12 schools will be selected through a competitive process, and receive grants for developing this innovative experience. They will also receive technical support to develop Site Management Teams of up to six persons in each school. Training will be provided to build the teams, review intervention strategies to aid the management and teaching/learning processes, and to develop community/parental links. Each "Lighthouse School" will further be responsible for developing collaborative leadership capacity in five additional schools. Funding will be provided to prepare final reports, and to disseminate information regarding best practice to other schools both during, and after, the site-based empowerment project.
- 2.35 In addition, the PESP will finance an extension of the current training activities that are offered by the National Council for Education in order to permit

expansion of training to include all members of Boards of Management, in addition to the Boards chairmen.

g) School attendance

- 2.36 This sub-component will finance community interventions and workshops with principals, teachers, and students in 100 schools with low attendance. It will build on a previous experience with a successful vandalism prevention program (SCOPE), financed by USAID, to promote school attendance. Further studies financed through the project will facilitate the design of future interventions by providing a deeper understanding of the root causes of absenteeism, its social causes as can be determined by the 1996 Survey of Living Conditions, as well as a better knowledge of best practices in other countries.
- 2.37 Loan resources will cover the following activities: (a) synthesis of various studies on the problem of poor attendance in Jamaican primary schools; (b) a brief study to examine the effect of the school lunch program on attendance; (c) two brief, targeted study tours to examine successful interventions in countries of similar circumstances; (d) designing school/community interventions geared toward addressing the root causes of absenteeism in 100 schools with low attendance rates; (e) training activities and workshops for stakeholders to work with school administrators toward solving the problem on a continuing and sustainable basis; (f) identification of innovative approaches, and recognition for successful schools and communities.

h) Efficiency gains

- 2.38 During preparation, the Bank identified several areas for efficiency gains in the education budget, including gains from: teacher redeployment via school districts; a more targeted management of teachers' leaves; and improvements in budget management and procurement activities. From the interventions identified to improve efficiency in the system, it is expected that about US\$5.0 million in annual savings could be realized in the medium term, including savings from the elimination of 89 redundant positions in the MOEC. Savings produced by the project would, over time, permit the financing of new policies for teacher certification and infrastructure maintenance, without generating additional costs for the system.
- 2.39 The PESP will finance studies, consultants, and training activities to support budget management, improvement of procurement procedures, new leave management practices based on a more equitable and effective modus operandi, and allocations to Teachers Colleges in line with the rationalization policies agreed with the Bank. In addition, the PESP will finance technical support for the redeployment and retrenchment of redundant personnel in the MOEC after the new information systems are operational.

3. Component 3: Civil Works (US\$10.5 million).

a) New Construction

- 2.40 This component will provide resources for the construction, furnishing, and equipping of approximately 11 primary and All Age schools, including two new schools, three full replacement schools, two partial replacements, and four expansions of existing schools. The proposed new school construction will provide approximately 4,965 student places of which 2,235 will be replacements; 1,365 will be extensions; and 1,365 will be net new places.
- 2.41 Replacement schools will replace existing buildings, which are beyond repair because of inadequate construction, structural defects, old age, and other conditions such as inadequate space for expansion. Expansion schools are located in existing facilities, which are severely overcrowded. All extensions will be located on sites with adequate land space for the extended facility.
- 2.42 All investment in civil works funded through the project will be both poverty targeted and needs-based, and compliant with technical criteria agreed with the Bank, including, among others: the alleviation of space shortages as defined by a minimum percentage of overcrowding above the regional mean; the location of schools in economically depressed areas; and the demonstration of unmet need through catchment analysis, including access and enrollment criteria. All construction will be undertaken in accordance with the norms established by the Technical Services Unit of MOEC and inspected by a qualified engineer, taking into account Bank requirements, prior to acceptance by the education authorities. To be consistent with best practices for enhancing equity and quality, all new and replacement schools will operate on a single-shift basis. Classroom blocks will be constructed using a standardized design. No adverse long-term environmental impact resulting from these limited construction activities is envisaged.

b) School maintenance.

- 2.43 The loan will provide resources for technical assistance, equipment, supplies, and training to establish and operate a detailed school inventory and database. Furthermore, given the request for new Bank financing for replacement schools and new schools included under this loan, the GOJ has committed to increasing the FY2000/01 budgetary allocations for the maintenance of primary schools to J\$275 million, and to increase future allocations over the life of the project, on a progressive basis, to reach the minimum level of US\$10 million per year, required for the appropriate maintenance of schools. Annual benchmarks to track the gradual increase in GOJ's budgetary allocations for maintenance of primary schools from a baseline of US\$6.5 million (J\$275 million) in FY 2000/01 to US\$10 million by FY 2005/06 are included in the logical framework (Annex II-1).

C. Program execution and unallocated expenditures (US\$5.2 million).

- 2.44 An additional US\$5.2 has been included in the project for operation of the PESP Project Management Unit (US\$3.5 million), and for unallocated expenditures (US\$1.7 million). PMU expenditures include costs for administrative disbursements, equipment, and staff.

D. Costs and financing

- 2.45 The total direct cost of the five-year project is US\$35.0 million. The associated financing costs including interest, commitment and inspection fees, would add an additional US\$4.5 million. IDB lending for US\$31.5 million will finance a combination of physical infrastructure, materials and equipment, consultant services, training, incremental operating expenses, financing costs during execution, and unallocated expenditures. The breakdown by investment category, the dimensioning of which was done on the basis of very detailed studies for each of the project components, is presented in Table II-I, below.

TABLE II-I. PRIMARY EDUCATION SUPPORT PROJECT (JA-0059) ILLUSTRATIVE COST TABLE (in US\$-MILLIONS)				
COST TABLE	TOTALS	IDB	LOCAL	%
PROGRAM COORDINATION				
Monitoring and Evaluation	0.5	0.5	0.0	
Program Management Unit	3.0	0.1	2.9	
Total Costs of Project Coordination	3.5	0.6	2.9	8.9
QUALITY				
Curriculum	1.5	1.5	0.0	
Textbooks and Supplementary Materials	0.6	0.6	0.0	
Literacy Interventions	1.0	1.0	0.0	
Assessment	1.0	1.0	0.0	
Teaching and Learning Resources	2.0	2.0	0.0	
Professional Development	3.9	3.9	0.0	
Total Costs of Quality Component	10.0	10.0	0.0	25.3
INSTITUTIONAL				
Institutional Strengthening	6.4	6.4	0.0	
Educational Management Information Systems	2.9	2.9	0.0	
Total Costs of Institutional Component	9.3	9.3	0.0	23.5
INFRASTRUCTURE				
Construction of New Schools	2.9	2.3	0.6	
Full Replacement of Existing Schools	2.9	2.3	0.6	
Partial Replacement of Existing Schools	1.2	1.0	0.2	
Extension of Existing Schools	2.8	2.3	0.5	
Technical support & Contingencies	0.7	0.0	0.7	
Total Costs of Infrastructure Component	10.5	7.9	2.6	26.6
Unallocated Costs	1.7	0.0	1.7	4.3
TOTAL DIRECT COSTS	35.0	27.8	7.2	88.6
FINANCIAL COSTS				
IADB Supervision Costs	0.3	0.3	0.0	
Commitment Fees	0.8	0.0	0.8	
Interest	3.4	3.4	0.0	
Total Financial Costs	4.5	3.7	0.8	11.4
GRAND TOTAL PROJECT COSTS	39.5	31.5	8.0	100

E. Terms and conditions of the loan

- 2.46 The Bank loan of US\$31.5 million will account for 80% of total project cost, distributed over a five-year implementation period. Local contributions covering the remaining 20% will be allocated to finance the civil works, project coordination, unallocated expenditures, and commitment fees. IDB financing will be drawn on OC resources (US\$) from the single currency facility. Interest will be partially financed by the IFF account. The following table shows the terms and conditions of the loan.

TABLE II-2: CONDITIONS OF FINANCING	
Source of funds	Ordinary Capital
Amount	US\$31.5 million
Amortization period	25 years
Disbursement	5 years
Interest rate	Variable, OC minus established IFF reduction.
Inspection and supervision	1% of the loan amount
Credit fee	0.75% per year on undisbursed amounts
Currency	US\$ from the Single Currency Facility

III. PROGRAM EXECUTION

A. The borrower and executing agency

- 3.1 The Borrower is the Government of Jamaica and the executing agency is the Ministry of Education & Culture.

B. Project execution and administration

- 3.2 Responsibility for the overall direction of the project lies with MOEC. The MOEC will be responsible for the implementation of project activities. Each component will be steered by an MOEC Unit Head.
- 3.3 A Project Management Steering Committee (PMSC) will be created to ensure integrated planning and programming of activities, effective networking among the different heads of division who are the component leaders, and monitor progress against targets and benchmarks. The PMSC will meet monthly under the chairmanship of the MOEC Permanent Secretary or designee.
- 3.4 A Project Management Unit (PMU), headed by a Project Management Coordinator, will report directly to MOEC Director of Projects in the Project Management and Technical Services Division, and be responsible for project administration, coordination, monitoring and supervision of the project. The PMU is designed to function primarily as a coordinating, supporting, and facilitating mechanism for the various divisions and units in the MOEC involved in PESP implementation, as well as for the PMSC. It will do this principally by guiding and assisting line units to program and implement annual work plans, including the procurement of goods and services as required by the line units, and by developing appropriate and adequate financial administration systems. **As a condition prior to first disbursement, the MOEC will present to the Bank evidence that the GOJ has: (a) approved the structure of the PMU, (b) appointed the PMU coordinator; and (c) established special banks accounts exclusively for the resources of the financing and local counterpart.**
- 3.5 MOEC divisions will play important roles in project management, being fully responsible for the introduction and development of the quality and institutional activities proposed under the project in the system. Actions of MOEC staffing, and activities of internal training proposed for the first two years of the project as part of the quality and institutional components, will ensure that MOEC will develop the needed critical mass and internal capacity to implement the project.
- 3.6 Articulation between the PMU and MOEC will be made through three subcommittees that will form part of the PMU. The subcommittees will have coordination and supervision responsibilities for the action plans and development of activities in the quality, institutional, and EMIS components, and will be formed by the respective MOEC division heads in charge for the execution of the

activities in each component. The Project Management Coordinator will act as Secretary in the subcommittees' meetings. The PMU will be responsible for the administration of the procurement of civil works, goods and services, and will be MOEC's principal liaison with the Bank. The first year action plan will include specific benchmarks to ensure that: (a) within 90 days of project eligibility, the GOJ has appointed the Project Management Steering Committee and its three technical subcommittees for quality assurance, institutional strengthening, and EMIS; and (b) within six months of project eligibility the GOJ has appointed seven full-time local specialists, and specialized local and international technical assistance to strengthen MOEC line offices in the implementation of PESP components. The selection of all project staff and consultants shall be conducted under open and fair competition.

C. Implementation mechanisms

- 3.7 **International and local Consultants** will support the educational quality, institutional strengthening, and information systems activities in the respective components. Heads of Divisions will be responsible for developing consultants' terms of reference, providing counterpart personnel, and guiding implementation of actions financed under the project. The PMU will provide technical assistance to the Heads of Division and provide administrative support in the procurement of all consultants.
- 3.8 **Training activities** for curriculum dissemination will be executed utilizing the cascade method of "training trainers", as described in Chapter II. The project will finance the training of turnkey trainers and mentors within schools for staff development in the use of the new curriculum.
- 3.9 The two pilot **School Districts** will be established in the first year of project execution, and the results will be evaluated in the fourth year, in order to assess the feasibility of replication.
- 3.10 **The leadership program** for principals will be executed through on-site and overseas training activities, and procured with a pre-qualified university or consortium of international universities, through a process of international bidding. Jamaica's Teachers Colleges will integrate fully into the training activities through the provision of facilities and staff. The first participants will enroll in September 2001. The Human Resource Management and Administration Department will finalize criteria for the program and its provider, invite submissions by accredited international universities to deliver the overseas program, invite submissions from an accredited international university or consortium of universities to delivery the program in Jamaica, and select the preferred organization. This division would also invite applications by principals, award scholarships to successful applicants, and work with other divisions to finalize study leave arrangements for study abroad. The **Management training** program will be developed by international and national consultants.

Approximately 80 trainees would complete the program within a two-year time frame.

- 3.11 **The civil works component** will be implemented in two stages. The first stage, covering the first three years of the project, will finance the construction and full replacement of the below five schools. Construction will begin in the first 18 months of project execution. In the second stage, years four and five, the remaining component funds would be expected to finance four extensions and two partial replacements. During the third year of execution the Bank and the MOEC will agree on the final list, designs, and tendering documents for the works to be undertaken in the second stage of the component. The procurement of civil works will be done by the PMU using international bidding. The PMU will work in close collaboration with the Technical Services Unit responsible for design and specifications for school construction. In addition, the PMU will work with the respective MOEC divisions responsible for other components to ensure integration and timely provision of goods and services procured under the project.

PEEP: Stage I School Selection			
Category	School	School Type	Student Places
New	Mansfield	Primary	840
New	Hellshire	Primary	525
Replacement	Sheffield	Primary	525
Replacement	Fruitful Vale	All Age	315
Replacement	Bromley	All Age	210

- 3.12 **As a condition prior for the disbursement of the civil works component, the MOEC shall present to the Bank the appropriate evidence for legal possession of land for the selected school sites, architectural/engineering designs, and tendering documents for Stage I of the civil works.**
- 3.13 **The EMIS databases** for infrastructure, human resources, and financial management will be installed under the project. The design of databases and implementation plans will be contracted with international and local specialists and respective hardware and software procured using international bidding. Maintenance requirements for database operation and training will be assessed in the design, and included in the costs financed under the project.
- 3.14 **Three grant facilities** to schools covering school improvement plans and action research for: (a) site based management activities; (b) operations research linked to on-site professional development activities; and (c) improvement of basic literacy skills for students in the most disadvantaged urban schools; will transfer

resources to schools and teachers to innovate best practice at the school level. The PMU will administer the grants under the direction of the MOEC Deputy Chief Education Officer School Operations, who will evaluate proposals and award the grants.

- 3.15 As part of its effort to identify and address social and gender issues, throughout project implementation, the PMU will implement measures to ensure the full and active participation of stakeholders representing teachers, educational administrators, public officials, and civil society (including the private sector, community organizations, families from different economic levels, and students). A coordinating mechanism will also be introduced to integrate PESP implementation with related sector initiatives, including the DfID debt-relief program, USAID grants for education support, and the World Bank secondary education project.

D. Implementation schedule

- 3.16 A comprehensive logical framework has been developed for the project (Annex II-1), and master plans for the components to guide project implementation, including detailed benchmarks, are included in the consultant studies approved by the MOEC during project preparation. The master plans identify, among other actions, implementation timetables, technical assistance requirements, costs, disbursements, external constraints, effective approaches for implementation, criteria for setting priorities and targeting strategic resources in the project, and indicators to monitor progress. Monitoring systems for all project components will be made operational in the first year of implementation. The Monitoring and Evaluation Plan in the Technical Annexes, which will form part of the PESP Implementation Manual, shows the benchmarks agreed on between the Bank and MOEC. **The definitive action plan for the first year of the project and the PESP Implementation Manual will be presented by the executing agency prior to first disbursement.**
- 3.17 Execution schedules and coordination between the different components will be reassessed and adjusted in periodic reviews contained in the monitoring procedures agreed upon between the Bank and MOEC (para. 3.29, 3.30).

E. Project financial management

- 3.18 All capital and operational funds required for the PESP will be identified in government's annual Development Program and Recurrent budget process. Bank resources and counterpart funds will be transferred to the MOEC as the project is executed, and will be deposited in two special accounts that should be opened for the PESP. The PMU will establish and maintain adequate financial, accounting, and internal control systems, and will present to the Bank annual audited financial statements regarding PESP expenses, and the semi-annual Revolving Fund Status Reports. The Bank will review the yearly capital and recurrent financing to ensure that the necessary resources are available to the project, and that the

efficiency gains were obtained for financing policy initiatives agreed with the Bank, related to: the efficiency and quality of teacher education, teacher certification and incentives, and school maintenance. A special financial information system will be created in the PMU to inform on the execution of disbursements and allocations in each component and to report on the efficiency gains achieved through reallocations and savings in the education budget. Flow charts and administrative procedures for disbursements of Bank and government resources will be included in the PESP Implementation Manual.

F. Procurement of goods and services

- 3.19 **Civil works and equipment.** All PESP civil works procurement will be carried out by the PMU in accordance with Bank procurement rules. Advisory committees, with the participation of the MOE legal and technical personnel, and a procurement specialist of the PMU, will be responsible for the analysis and prior recommendations for procurement and acquisitions. Acquisition of goods and related services and contracting of civil works will be subject to the procedures stated in Annex B of the loan contract. International public bidding will be mandatory for the acquisition of goods that exceed US\$250,000 and US\$1,500,000 for civil works. Standard bidding documents for the first stage of execution will be prepared by the PMU during the first six months of execution and revised by the Bank in a monitoring mission, which will take place at the end of the first semester of project execution.
- 3.20 **Consulting services.** Approximately 214 person months of international consulting and 33 of local professional services has been programmed over the life of the PESP. Acquisition of consulting services will be subject to the procedures set forth in Annex C of the loan contract, and international competitive bidding will be mandatory for contracts exceeding US\$200,000. (See Annex III-1 for the procurement plan.)
- 3.21 **Prior review** by the Bank will be required for all procurement documents for International Competitive Bidding. With respect to local competitive bidding, prior review of procurement documents by the Bank will be required for the acquisition of goods and services. Once PESP has demonstrated that effective procurement procedures have been established, local procurement will be further reviewed on an ex-post basis using Bank guidelines.

G. Maintenance and replenishment

- 3.22 All operational resources necessary for maintenance of the existing primary school system were revised with the GOJ, having agreed on a base-line for the year 2000 equivalent to approximately 65% of the required funds and critical benchmarks for achieving the minimum level of maintenance during the execution of the project, equivalent to US\$10 million per year. At the end of the project, the allocations for maintenance in the recurrent budget will cover 100% of the minimum resources needed for assuring basic maintenance of all primary

schools. The Monitoring and Evaluation Plan included in the Technical Annexes shows the "critical benchmarks" agreed on between the Bank and the MOEC, which will be monitored in the annual reviews between the Bank and the GOJ. In addition, the MOEC commits to operate and maintain the schools and equipment financed with project resources in accordance with accepted technical standards and to make the necessary resources available for their efficient operation and maintenance.

- 3.23 The MOEC will prepare maintenance plans for each one of the schools financed in the infrastructure component prior to the approval of construction by the Bank. In the case of the acquisition price of new equipment for IT (computers, software, multimedia equipment), the contract will include a clause covering five years of preventive maintenance and repairs to ensure optimal performance of the equipment. MOEC will allocate resources to replace equipment when broken or past its useful life.
- 3.24 Ongoing maintenance of schools will be progressively transferred to the local school boards under the new school-based management scheme. The MOEC will open a line item for each school in its annual budget and provide resources to the schools under a simple contract mechanism.
- 3.25 Maintenance reports on all works and equipment acquired under the project will be prepared and submitted to the Bank on an annual basis during execution and for five years after the end of the project.

H. Disbursement schedule

- 3.26 The proceeds of the proposed loan are expected to be disbursed based on the schedule shown in the following table:

TABLE III.1. CALENDAR OF DISBURSEMENTS (US\$100,000)			
	TOTAL	IDB	LOCAL
Year 1	8.5	7.1	1.4
Year 2	12.9	10.3	2.6
Year 3	7.3	5.9	1.4
Year 4	7.1	5.5	1.6
Year 5	3.7	2.7	1.0
TOTAL	39.5	31.5	8.0

- 3.27 The length of the disbursement period takes into account the need of achieving the results on a timely basis. Disbursements will be made against certified statements of expenditures.

I. Advance of funds, recognition of local counterpart, and retroactive financing

- 3.28 The Bank will disburse the equivalent to 5% of the financing to establish a revolving fund to pay for projected expenditures. The revolving fund will be replenished against the presentation of disbursement requests per current Bank policy. The PMU will prepare and submit to the Bank, within a period of 60 days after a closing of each semester, a semi-annual project report showing the used of the loan's funds and the status of the project financing and cost as of June 30 and December 31. With regard to recognition of local counterpart and retroactive financing. The GOJ has requested that the Bank recognize expenses incurred by the executing agency related to the project prior to loan approval by the Bank. Subject to verification and compliance with the Bank's policy, up to US\$1,000,000 could be recognized as retroactive financing, and US\$300,000 as local counterpart.

J. Project monitoring and evaluation

- 3.29 Overall monitoring and reporting of the project will be responsibility of the PMU, with assistance of local and international consultants. Specific tasks include, among others: (a) preparing progress reports on project implementation, which would be submitted to the Bank on a semi-annual basis; (b) preparing updated implementation schedules and expenditure plans for the annual review; (c) monitoring indicators and key performance targets; (d) monitoring institutional reforms and efficiency gains; (e) monitoring the agreed upon teacher certification plan; (f) preparing recommendations for the different components, and (g) monitoring budgetary allocations for capital and recurrent cost as well as budget allocations for schools maintenance. During project preparation, MOEC and the Bank agreed on the major requirements of the monitoring system to track project implementation as well as the monitoring indicators and key performance targets for each component and policy actions.
- 3.30 **Periodic and annual reviews.** A project launch workshop will be held within three months of eligibility. In addition, the project team will participate in two administrative reviews during year one, and one annual review/evaluation per year in subsequent years to assess the progress on project implementation, periodic and annual milestones proposed for each component, budget disbursements for capital and recurrent costs, action plans for the subsequent year, recommendations made by independent consultants and evaluations. As part of the annual review the Borrower and the Bank will monitor the project execution schedule, and evaluate progress towards achieving benchmarks and implementations targets included in the Monitoring and Evaluation Plan, as well as the implementation of policy actions agreed during project preparation with respect to the rationalization and reform of Teachers' Colleges, teacher

certification, school maintenance, and efficiency gains. The annual review will provide the Borrower and the Bank an opportunity to agree on adjustments to the Action Plan and disbursement schedule for the following year. The Borrower and the executing agency will undertake actions to improve the execution of the project and to achieve agreed policy benchmarks, within a period of 90 days following each annual review/evaluation.

- 3.31 **Final evaluation.** Given the nature of the project, which includes a series innovative actions and pilot interventions, it was agreed with the MOEC, that within six months prior to the expected termination of the project, a final evaluation will be conducted by an external consultancy. The evaluation will focus on the degree to which target indicators of access, equity, quality and efficiency have been achieved, and the impact of implementation of institutional strengthening activities, and overall project execution.

K. Inspection and supervision

- 3.32 The country office will continuously support implementation of the project. Project supervision will require an estimated 16 staff weeks per year provided by the COF, and seven weeks of headquarters supervision.
- 3.33 **Audits.** The Bank will require that an independent firm acceptable to the IDB audit the accounts of the project in accordance with generally accepted auditing practices. The PMU will present annual audited financial statements, no later than three months after the end of each calendar year, during project execution.

IV. VIABILITY, BENEFITS, AND RISKS

A. Viability

- 4.1 **Financial viability.** Given the difficult economic and fiscal situation Jamaica is experiencing at the moment, and to ensure long-term fiscal sustainability, the project was designed to achieve its goals without generating any significant incremental recurrent costs. A detailed analysis of all incremental recurrent costs generated by the actions proposed as part of the project concludes that, during the execution period, the incremental recurrent costs not covered by the project are negligible, representing only 0.14% of the present primary education sector recurrent budget. After project completion, these incremental recurrent costs are projected to continue to be relatively small, totaling less than US\$1 million per year, or 0.63% of the primary sector recurrent expenditures.
- 4.2 Other additional recurrent costs, in the order of US\$4 million per year, will eventually be generated by policies that MOEC is currently in the process of implementing and which, although not part of project-funded activities, were agreed to with the GOJ as part of the project preparation process and will be monitored during project execution. These agreements include the gradual increase in certified teachers to 95% of the teaching corps, the reintroduction of incentives to ensure that schools in rural and disadvantaged urban areas are also staffed by certified teachers, and the increase in expenditures for maintenance and equipment of primary schools to appropriate levels. It is further expected that these additional recurrent costs can be more than fully covered by the cost savings (in the order of up to about US\$5 million per year) that would result from the implementation of other actions that were identified as part of the efficiency gains analysis conducted during the preparation stage. Some of these actions would include a more efficient and equitable deployment of teachers among schools; better financial management and procurement systems; improved allocation and use of resources for teacher study leaves; and a more efficient management of fiscal and human resources through the introduction of school districts.
- 4.3 **Social viability.** The PESP qualifies as a social equity-enhancing project as described in the indicative targets mandated by the Bank's Eighth Replenishment (Document AB-1704). Furthermore, the project automatically qualifies as a Poverty-Targeted Investment, given its focus on primary education. As part of its effort to identify and address social and gender issues, MOEC will enlist the full and active participation of stakeholders in the review and development of all learning resources to be delivered through the project. The project will mitigate the negative impact of the inequitable distribution of primary-school places through the targeted expansion of coverage. It will further strengthen the delivery of quality education in disadvantaged areas through the reinvestment of cost-savings into targeted intervention programs. Measures to reform teacher education will focus on upgrading the skills of the teaching corps, and integrating strategies for conflict resolution, guidance, and counseling. This is considered critical in the context of the high-level of violence that exists in Jamaica and the

need for mitigation and sensitization skills for teachers and students in its schools. The primary beneficiaries of qualitative improvement and quantitative expansion are those from lower socioeconomic backgrounds, who are at the margin of both equity and achievement.

- 4.4 **Institutional viability** is supported by project assistance to the corporate planning process in MOEC. In this respect, the PESP will finance the emergence of a new Ministry leadership, improvements to performance and accountability systems, internal communication processes, inspection procedures and standards, and a new management information system in the Ministry. New policies will be instituted through the project on a pilot basis to improve teacher deployment, both on a sector-wide basis within the system and at the Ministry level. Successful implementation will be sustained in a strong management unit and in a new participatory strategy that will directly engage MOEC management and staff, throughout new lines of communication and management direct involvement in the decision-making and supervision of the project. Technical difficulties observed in the past with the execution of civil works were appropriately addressed through the analysis and proposal for different actions that, when properly implemented, will support and strengthen the design and contract management process within MOEC. Recommendations and benchmarks for efficiency gains in the system were accurately prepared throughout a very detailed study during project preparation and concrete actions to obtain cost savings in the education budget are expected to start in the next fiscal year.
- 4.5 **Environmental impact.** Component 3 will require the construction of two new and three replacement schools, and the extension or partial replacement of approximately five other schools. A land survey to be conducted as part of the siting exercise, will assess potential environmental impact in determining specific works; review local environmental norms and legislation to ensure that all construction-related activities meet Bank environmental requirements; and if necessary, identify complementary provisions which ensure that areas with high environmental sensitivity or incompatible land uses are excluded. Where new construction is required, it will be carried out in accordance with the norms established by the Technical Services Unit of MOEC and inspected by a qualified engineer, prior to acceptance by the education authorities. No adverse long-term environmental impact is envisaged.

B. Benefits

- 4.6 **Social equity and quality.** One of the main elements driving the design of the project has been the need to ensure that all the proposed actions contribute to improved equity and performance throughout the primary education system. In infrastructure, for instance, all of the proposed investments are targeted to poor areas; and the incremental resources for maintenance will address the most pressing needs in terms of repairs and equipment replacement, which tend to be much more serious in rural and depressed urban areas. With respect to quality improvements, all primary students and their teachers will benefit from the

effective implementation of the new curriculum, the provision of relevant teaching and learning resources, and the use of continuous assessment for improved instruction. In addition, 80 of the most disadvantaged schools will be targeted for a special literacy intervention program, aimed at improving learning outcomes for children up to Grade 4 in these schools. The agreement to gradually reduce the proportion of uncertified teachers in the system, most of them concentrated in the poor urban and rural areas, from the current 20% to under 5% by 2005/06, together with the re-introduction of incentives to attract qualified teachers to disadvantaged schools, are also expected to significantly contribute to achieving a more equitable allocation of human and financial resources at the primary level. On the institutional side, the establishment of school districts will allow for the re-deployment of teachers and a more equitable distribution of resources among schools. Finally, the proposed interventions in school attendance are expected to contribute to the alleviation a serious problem currently affecting the poorest children, especially boys, in the system. Performance indicators to measure social equity enhancement are included in the Monitoring and Evaluation Plan.

- 4.7 **Increased efficiency** resulting from improved financial and human resources management, and other actions contained in the project, are critical over the next years, in order to implement and sustain new policies for improved quality and equity. The school district pilot will enable the redeployment of teachers in response to changes in enrollment. Properly implemented, automation of the personnel, financial management, and infrastructure databases will result in better, and more time, outcomes at an estimated annual savings of about US\$1.7 million. The management training programs will develop an in-house capacity to manage resources more effectively, thereby, creating better value for dollars spent. Improved procurement practices, including the establishment of a central procurement unit will, in principle, produce estimated annual savings of US\$1.0 million. Additional savings will be generated by introducing efficiency measures in the budget allocation process, and through the rationalization of teacher education. Finally, the proposed reallocation of US\$2.1 million of the US\$3.5 million currently spent on teachers' leaves each year, would free-up valuable resources over the short-term; just as a more proactive maintenance policy would contribute to savings over the long-term.
- 4.8 It is expected that the cost savings originated in the project will be primarily reinvested in policy initiatives, including the certification of pre-trained teachers in economically depressed zones; the maintenance of buildings, with direct benefits to schools that attend students coming from low-income families; and in strengthened school management at the district and/or regional levels. The rationalization program of Teachers' Colleges will produce savings that could be used to expand community-based professional development activities that will be accessible to the teaching force in rural and remote areas. Cost savings will also help to re-institute incentives that attract qualified teachers to teach in schools located in remote and disadvantaged areas.

- 4.9 **Improved Management Information Systems** are expected to result in a better informed decision making process as an outcome of more accurate and current data for planning and monitoring; a more efficient resource management system due to rationalization of procedures, increased productivity, and enhanced integration between MOEC and the Regional District Offices; an improved capacity to quickly and reliably generate statistics; the integration of technology information pockets within the MOEC; and the development of a long-term vision for the application of information technologies in the management of Jamaica's education system. The end result will be a more efficient allocation of scarce resources.

C. Risks

- 4.10 **Project execution.** The complexity of the project, as well as the delays that occurred in the execution of the previous project, were recognized as the main implementation risks for the new project. The MOEC will use a different approach to project execution than that used under PEIP II. In the new scheme, a reduced management unit will focus on management functions, and advise the involvement of MOEC technical units in the design, execution, and monitoring of the components. MOEC offices will have full responsibility for the execution of the project. As a consequence, technical performance and accountability will be spread over the whole Ministry, instead of being concentrated in a separate unit. The establishment of a steering committee chaired by the Permanent Secretary, three sub-committees for specific areas chaired by MOEC heads of department, and the positioning of technical coordinators in the PMU, will further ensure the integration of technical inputs. The institutional strengthening of MOEC staff and new EMIS will further support a deeper involvement by MOEC in activity management and results monitoring.
- 4.11 In the PEIP II, implementation delays and cost overruns occurred mostly in the civil works component. These causes were analyzed and addressed during project design as follows: (a) the size of the component in the new project is significantly smaller; (b) planning of civil works and procedures for contract management were anticipated; (c) complete designs and land issues will be resolved prior to any disbursement of the component; and (d) tendering documents and construction contracts for the first stage (60% approximately of the total cost of the component) will be completed and approved by the Bank in the first year of execution. Refurbishments, which originated an important part of unexpected costs overruns and delays in the execution of previous project, were not included in the current initiative, given the fact that Jamaica is receiving grants from donors to attend similar purposes, and that the loan will support a new, sustainable maintenance policy for school buildings.
- 4.12 **Financial risks.** A potential problem for any program being implemented in a country undergoing the kinds of macroeconomic problems Jamaica is experiencing at the moment, is the risk of the government not being able to allocate sufficient counterpart resources to the program in a timely manner, or of

not covering the incremental recurrent costs to be generated by its implementation. However, as mentioned in paragraph 4.1, the proposed operation was designed explicitly taking into account the need to minimize counterpart fund requirements, while the incremental recurrent costs that will be directly and indirectly generated by the project could be more than compensated by the potential cost and efficiency gains savings identified as part of the institutional analysis undertaken during project preparation.

- 4.13 **Information systems.** Possible risks identified in the area of information systems include: (a) a lack of high-level support implement EMIS actions; (b) inadequate technical support for the seamless operation of the system; (c) the potential loss of trained technical personnel in the future; and (d) delays related to the procurement of hardware and software. These risks will be mitigated through the filling of the post of Director of EMIS in MOEC; and the creation of a special sub-committee composed of top MOEC leadership to oversee the integration of all computer and telecommunications systems. In addition, the EMIS sustainability plan includes resources to attract and keep the skilled personnel necessary to operate the system, as well as support for training and monitoring activities throughout project implementation. Finally, the Bank, through its Regional Operations Support Offices for Procurement and Information Technology, can provide support to ensure adequate and expedient implementation of all required procurement procedures, including advice on the required technologies.

PRIMARY EDUCATION SUPPORT PROJECT (JA-0059)

LOGICAL FRAMEWORK

NARRATIVE SUMMARY	PERFORMANCE MONITORING INDICATORS ¹	SOURCES OF INFORMATION	ASSUMPTIONS
GOAL: Improve the performance, efficiency, and equity of the primary education system.	<ul style="list-style-type: none"> • 10% increase in the levels of literacy and numeracy of primary school students, using NAP test results. • 5% increase in school attendance • Increased efficiency results in reallocation of approximately US\$5 million in MOEC savings to teacher certification and school maintenance • 95% of all primary school teachers certified 	<ul style="list-style-type: none"> • Baseline Study • Results of the National Assessment Program • Annual reports from the MOEC, and PIOJ • Annual reports of schools • Summative Evaluation 	<ul style="list-style-type: none"> • Effective coordination between MOEC and PESP. • Sustained participation of all stakeholders • Accountability is enforced

¹ Baseline indicators will measure Project progress between baseline year 2000 and end of Project 2005/2006.

NARRATIVE SUMMARY	PERFORMANCE MONITORING INDICATORS ¹	SOURCES OF INFORMATION	ASSUMPTIONS
<p>PURPOSE:</p> <p>Quality Assurance Component:</p> <p>Revised primary curriculum implemented</p> <p>National Assessment Program in all primary schools implemented</p> <p>Teacher education improved</p> <p>Availability of quality Textbooks and supplementary material to all students increased in the target population</p> <p>Network of demonstration schools to model best practices and inform future policies developed</p>	<ul style="list-style-type: none"> • 75% of teachers utilize the new curriculum and the recommended teaching practices • Pre-trained teachers in primary school system comprise no more than 5% of full teaching force. • By the end of the Project, all primary schools utilize Grade 1 & 4 tests and continuous assessment results to plan and improve instruction. • Text books and supplementary materials available and effectively utilized in all 12 Lighthouse schools. 	<ul style="list-style-type: none"> • Baseline Study • Formative evaluation reports:- Reports from training and Education Officers - Reports from Teachers' Colleges and MOEC • Results of evaluation studies • PIOJ & PAMCO Monitoring Reports • Summative Evaluation Reports • MOEC's Reports 	<ul style="list-style-type: none"> • Effective and sustained monitoring of all new methods • All parties support and are involved in all stages of execution • NAP and SAU are merged into assessment unit, and positions staffed. Teacher training conducted is relevant to teacher performance and tied to improve student achievement. • Materials developed are relevant to the curriculum and adequately provided on a timely basis • There are no legal and technical barriers to national implementation of best practices
<p>Institutional Development Component:</p> <p>Educational management capacity strengthened at the central, regional, local school levels</p> <p>New policy for resource management and teacher redeployment modeled</p>	<ul style="list-style-type: none"> • Management training program implemented at central regional and local levels • 12 Lighthouse schools operational • 50% of schools have developed and implemented school improvement plans. • 2 pilot school districts implemented • Teachers in the 2 pilot school districts deployed according to new policy • New budget, procurement and accountability systems and procedures implemented 		<ul style="list-style-type: none"> • Management training is relevant to school improvement, and the improvement of processes that occur within the MOEC. • Hardware and software are installed, training and support to MOEC staff provided.

NARRATIVE SUMMARY	PERFORMANCE MONITORING INDICATORS ¹	SOURCES OF INFORMATION	ASSUMPTIONS
<p>Improved:</p> <ul style="list-style-type: none"> communications and access to information among MOEC leadership and regional offices record keeping of HR and census data information for all school based personnel timeliness of school facility and maintenance information 	<ul style="list-style-type: none"> 70% of MOEC and regional personnel have desktop access to important personnel, infrastructure, school census, and NAP data and make use of MOEC intranet facility. Length of time to confirm principal's appointment reduced to 6 months 50% reduction in time to approve leave applications 20% of blue prints of facilities converted to Auto Cad System 50% of MOEC personnel on line using MOEC intranet 	<ul style="list-style-type: none"> MOEC's Reports MOEC's Annual Reports, Feedback from schools Reports from the MOEC Feedback from clients of MOEC Reports of Regional Authorities, Feedback from schools Schools Annual Reports, Feedback from parents, teachers and students MOEC, PIOJ reports Formative Evaluation reports Summative Evaluation reports 	
<p>Physical Works Component:</p> <p>Increased availability of quality classroom spaces</p> <p>Increased government allocation of resources for school maintenance. More efficient maintenance database.</p>	<ul style="list-style-type: none"> 2 new schools constructed, 3 fully replaced, 2 partially replaced, and four extended. 4,935 new places. At least US\$10,000,000 allocated to school maintenance annually according to the following schedule: 2000/01 US\$6.5 million; 2001/02 US\$8.0 million; 2002/03 US\$8.5 million; 2003/04 US\$9.0 million; 2004/05 US\$9.5 million; 2005/06 US\$10 million. Detailed school inventory and database established and Operating 	<p>Reports of Construction Consultants and MOEC</p> <ul style="list-style-type: none"> Reports of Construction Consultants and MOEC Reports of MOEC, Feedback from Schools Annual GOJ budget 	<ul style="list-style-type: none"> Facilities are maintained, staffed and equipped. Adequate resources provided on timely basis to effect required maintenance

NARRATIVE SUMMARY	PERFORMANCE MONITORING INDICATORS ²	SOURCES OF INFORMATION	ASSUMPTIONS
<p>RESULTS</p> <p>Increased equity and student performance due to improvement in quality of education</p> <p>All primary teachers trained to use revised curriculum and assessment procedures. Teachers utilize the revised curriculum and the recommended practices in all schools</p> <p>Schools utilize assessment results to improve instructions.</p> <p>Improved teacher and principal performance due to modernized and rationalized teacher education, professional development and in-service training</p> <p>Teachers' Colleges curriculum reformed</p> <p>Professional development programs for principals established</p> <p>Level certified primary teacher at the 95% benchmark achieved</p>	<ul style="list-style-type: none"> • Increase of 10% in student achievement in Grades 4 and 6 as measured by NAP 2000 results. • 100% primary school teachers trained in revised curriculum and assessment procedures. • Curriculum at Teachers Colleges reflects the revised primary curriculum. • 805 principals trained • 60% of schools have implemented a plan to improve student performance • Projected reduction of uncertified teachers operationalized as follows, from a baseline of 1,972 (1999/2000): 954 (2000/01); 824 (2001/02); 686 (2002/03); 536 (2003/04); 484 (2004/05) • Study for reintroduction of incentives finalized, measures agreed with Bank. Year 2 	<ul style="list-style-type: none"> • Training Reports and evaluations of Education Officers • Analysis of programs • Analysis of Teachers' Colleges curriculum • Annuals Reports • Records of the MOEC • Formative and summative evaluation reports • Studies conducted 	<ul style="list-style-type: none"> • Reform of teacher education is successfully accomplished and there are no legal barriers for the implementation of strategies designed for that purpose. • In service training is well designed and relevant. • Training of principals emphasizes good school management practices • There are incentives for school personnel to improve school.

NARRATIVE SUMMARY	PERFORMANCE MONITORING INDICATORS ¹	SOURCES OF INFORMATION	ASSUMPTIONS
<p>Books delivered on time and properly stored</p> <p>More attractive and better quality books reduce problems such as detachable covers, loose binding, etc.</p> <p>Book bank implemented.</p> <p>Wide variety of supplementary readers purchased and delivered timely to schools</p> <p>Successful practices focusing on literacy and numeracy identified, adapted, and utilized in schools.</p> <p>Increased efficiency, effectiveness and sustainability in education administration</p> <p>Management strengthened at the Central and Regional levels of the MOEC</p>	<ul style="list-style-type: none"> 800 schools with appropriate stocks of texts with no gaps in provision at the beginning of each school year 800 schools with improved storage space for books A 3 year book life achieved. 500 schools receive new stock of 100 readers each. Pilot programs in 80 schools located in disadvantaged areas for improving literacy documented, generalized and institutionalized. MOEC increases internal efficiency by reducing the administrative work force. EMIS operational and in use for budget planning and allocations. 35 senior and middle managers in the MOEC and 100 MOEC regional senior and middle managers complete management training 	<ul style="list-style-type: none"> Reports of the MOEC Reports of the MOEC Reports of the Regional Authorities School Reports and PTA Reports School principals Teachers with specific responsibility for school-based record-keeping and textbook allocation Annual reports from MOEC, and PIOJ Summative Evaluation 	<ul style="list-style-type: none"> Book conservation techniques applied Parental involvement Cupboards delivered to schools and utilized for book storage All books and support materials delivered to schools prior to the start of the school year.

NARRATIVE SUMMARY	PERFORMANCE MONITORING INDICATORS ³	SOURCES OF INFORMATION	ASSUMPTIONS
School administration strengthened.	<ul style="list-style-type: none"> 800 school principals complete school management diploma program. Lighthouse schools increased the efficiency and effectiveness of its administration, by eliminating 60% of the principals routine work load. Members of 800 school boards trained Site Management Teams in Lighthouse schools operation. 	<ul style="list-style-type: none"> Annual reports from MOEC. and PIOJ Summative Evaluation Annual reports of schools 	
Two school districts in operation	<ul style="list-style-type: none"> Pilot school districts incorporate budgeting, payroll, procurement, accounting, and financial management functions 		
School attendance improved	<ul style="list-style-type: none"> Average daily attendance in 100 primary schools with the lowest levels of attendance reach 85% or higher rates. No attendance differences between male and female in school districts 		<ul style="list-style-type: none"> Demographic/assumptions valid
<p>Intranet established, improved communications, and access to information among MOEC leadership at the central and regional offices.</p> <p>Information related to human resources, school census, NAP, infrastructure, maintenance and financial issues, accessible on the Intranet.</p>	<ul style="list-style-type: none"> 70% of MOEC and regional staff actively utilizing Intranet for planning, policy and educational management purposes. Collection and analysis of census data reduced to 4 months 		<ul style="list-style-type: none"> External conditions permit achievement of school attendance targets.

NARRATIVE SUMMARY	PERFORMANCE MONITORING INDICATORS ¹	SOURCES OF INFORMATION	ASSUMPTIONS
Physical conditions which have a negative impact on learning ameliorated.	<ul style="list-style-type: none"> 2 new schools, 4 extensions 3 replacement schools, 2 partial replacement constructed. 	<ul style="list-style-type: none"> Statistical Reports Planning Development Division Site visits 	<ul style="list-style-type: none"> Timely flow of funds Timely completion of contracts
Enhanced capacity of MOEC and community to provide and maintain facilities conducive to learning.	<ul style="list-style-type: none"> Schools have implemented maintenance plans with community participation. 		
ACTIVITIES:	US\$ (000,000)		
PROGRAM COORDINATION			
Monitoring and Evaluation	0.5	<ul style="list-style-type: none"> Project Management Unit Monitoring Unit within MOEC P.I.O.J. Formative and Summative Evaluation Reports IDB Missions Audits 	<ul style="list-style-type: none"> Support from Government of Jamaica and MOEC Efficient management practices Availability of counterpart funds Disbursement on target Macroeconomic stability
Program Management Unit	3.0		
Total Cost Program Coordination	3.5		
QUALITY			
Curriculum	1.5		
Books & Supplementary Materials	0.6		
Capacity Interventions	1.0		
Assessment	1.0		
Teaching and Learning Resources	2.0		
Professional Development	3.9		
Total Cost of Quality Component	10.0		
INSTITUTIONAL			
Institutional Strengthening	6.4		
IT S	2.9		
Total Cost Institutional Component	9.3		
INFRASTRUCTURE			
Construction of New Schools	2.9		
Replacement Existing Schools	2.9		
Partial Replacement Existing Schools	1.2		
Extension of Existing Schools	2.8		
Technical support & Contingencies	0.7		
Total Cost Civil Works	10.5		
Allocated Costs	1.7		
TOTAL DIRECT COSTS	35.0		

PRIMARY EDUCATION SUPPORT PROJECT (PESP)

Illustrative Procurement Schedule

Procurement Items	Financing		Method	Publication Dates	Co US\$
	IDB %	LOCAL %			
IL WORKS					
<i>Construction of new schools</i>					
) Construction of new schools (1 bid)*	80	20	ICB	1 st yr/2 nd Sem	2
) Equipping of new schools (1 bid)	80	20	ICB	2 nd yr/1 st Sem	
<i>Full replacement of existing schools</i>					
) Construction (1 bid)	80	20	ICB	1 st yr/2 nd Sem	2
) Equipping of schools (1 bid)	80	20	ICB	2 nd yr/1 st Sem	
<i>Partial replacement of existing schools</i>					
) Construction (1 bid)	80	20	ICB	3 rd yr/1 st Sem	
) Equipping of schools (1 bid)	80	20	NCB	3 rd yr/2 nd Sem	
<i>Extension of existing schools</i>					
) Construction (1 bid)	80	20	ICB	3 rd yr/1 st Sem	
) Equipping of schools (1 bid)	80	20	ICB	3 rd yr/2 nd Sem	2

Procurement Items	Financing		Method	Publication Dates	Co US\$
	IDB %	LOCAL %			
ODS and EQUIPMENT					
Computers, printers and information hardware (2 bids, 2 contracts)	100		ICB	1 st yr/2 nd Sem and 2 nd yr/2 nd Sem	
Software (2 bids, 4 contracts)	100		ICB	1 st yr/2 nd Sem and 2 nd yr/1 st Sem	
Scanners (1pckg)	100		DC	1 st yr/2 nd Sem	
Electrical equipment (2 bids, 3 contracts)	100		DC	1 st yr/2 nd Sem and 2 nd yr/2 nd Sem	
Audio production (1 pckg)	100		NCB	1 st yr/2 nd Sem	
Libraries and resource centers (2 bids)	100		NCB	1 st yr/2 nd Sem	
Other materials and supplies for info tech	100		NCB	1 st yr/2 nd Sem	
Vehicles (2 bids)	100		NCB	1 st yr/2 nd Sem and 2 nd yr/1 st Sem	
Furniture (2 bids)	100		NCB	1 st yr/2 nd Sem and 2 nd yr/1 st Sem	
Office equipment (fax machines, overhead projectors, etc.) (2 bids, 2 contracts)	100		NCB	1 st yr/2 nd Sem and 2 nd yr/1 st Sem	

Procurement Items	Financing		Method	Publication Dates	Co US\$
	IDB %	LOCAL %			
TEXTBOOKS AND SUPPLEMENTARY MATERIALS					
Curriculum materials (1 bid, 1 contract)	100		ICB	1 st yr/1 st Sem	
Assessment manuals (1 bid, 1 contract)	100		ICB	1 st yr/1 st Sem	
Instructional videos (1 bid, 1 contract)	100		DC	1 st yr/1 st Sem	
Storage cupboards (1 bid, 1 contract)	100		ICB	1 st yr/1 st Sem	
Supplementary readers (2 bids, 2 contracts)	100		ICB	1 st yr/1 st Sem and 4 th yr/2 nd Sem	
Annual guides for Infotech (1 bid, 2 contracts)	100		NCB	2 nd yr/1 st Sem	
Supplementary materials for ProDe (1 bid, 1 contract)	100		NCB	1 st yr/2 nd Sem	
Learning Support materials IS (1 bid, 1 contract)	100		NCB	1 st yr/2 nd Sem	

Procurement Items	Financing		Method	Publication Dates	Co US\$
	IDB %	LOCAL %			
CONSULTANT SERVICES					
International Consultants (individuals)	100		ICB	1 st yr/1 st Sem to 5 th yr/1 st Sem	3
National Consultants (firms, 8 contracts)	100		NCB	1 st yr/1 st Sem to 3 rd yr/1 st Sem	
National consultants (individuals)	100		NCB	1 st yr/1 st Sem to 3 rd yr/1 st Sem	1
TRAINING SERVICES					
Workshops/Training/Seminars/Conferences	100		NCB	1 st yr/1 st Sem to 5 th yr/1 st Sem	2
Studies on shore (2 bids, 4 contracts)	100		ICB	1 st yr/1 st Sem	2
Studies abroad/individual fellowships (2 bids, 4 contracts)	100		ICB	1 st yr/1 st Sem and 1 st yr/2 nd Sem	1

International Competitive Bidding; .NCB: National Competitive Bidding; .DC: Direct Contracting

budgeted amounts not included in the procurement table: (US\$000)

for Literacy interventions in schools located in disadvantage areas (1,000); College teachers rationalization (budgeted amounts) (500); ProDe Grants (700); Internet connections Info tech (90); Dedicated phone lines (600); Infotech pilots (140); Teaching and learning resources for literacy (500); Study tours (600); Education allowances (64); Recurrent costs Pilot school districts (800); Other Assessment expenditures (53); PMU (staffing and offices supplies) (2,900); Training MOEC for Info Tech (790); MOEC multimedia resource center (37); Sustainability costs EMIS (930); Visits to schools (recurrent costs) (800); Other agencies (900).

PROPOSED RESOLUTION

JAMAICA. LOAN ___/OC-JA TO THE
GOVERNMENT OF JAMAICA
(Primary Education Support Project)

The Board of Executive Directors

RESOLVES:

That the President of the Bank, or such representative as he shall designate, is authorized, in the name and on behalf of the Bank, to enter into such contract or contracts as may be necessary with the Government of Jamaica, as Borrower, for the purpose of granting it a financing to cooperate in the execution of a primary education support project. Such financing will be for the amount of up to US\$31,500,000 from the Single Currency Facility of the Ordinary Capital resources of the Bank, and will be subject to the "Special Contractual Conditions" and the "Financial Terms and Conditions" of the Executive Summary of the Loan Proposal.

PROPOSED RESOLUTION

JAMAICA. PARTIAL PAYMENT OF INTEREST ON LOAN ___/OC-JA
TO THE GOVERNMENT OF JAMAICA
(Primary Education Support Project)

The Board of Executive Directors

RESOLVES:

That the President of the Bank, or such Representative as he shall designate, is authorized, in the name and on behalf of the Bank as administrator of the Intermediate Financing Facility Account (the "Account"), to enter into such contract or contracts as may be necessary with the Government of Jamaica, as Borrower, and to adopt other pertinent measures to use the resources of the Account to pay a portion of the interest due by the Borrower on outstanding balances of the loan authorized by Resolution DE-___/___, in accordance with the provisions set forth in Document FN-263-2, as amended, approved by the Board of Executive Directors on December 21, 1983.