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STAFF APPRAISAL REPORT

BELIZE

PRIMARY EDUCATION DEVELOPMENT PROJECT

NOVEMBER 8, 1991

Human Resources Division
Country Department III
Latin America and the Caribbean Regional Office

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Currency Equivalents
(As of January 1, 1991)

Currency Unit = Belizean Dollar (BZ\$)
BZ\$1.00 = US\$0.50
US\$1.00 = BZ\$2.00

Fiscal Year

January 1 - December 31

School Year

September 1 - June 30

PRINCIPAL ABBREVIATIONS AND ACRONYMS USED

BELCAST	Belize College of Arts, Sciences and Technology
BNSE	Belize National Selection Examination
BSMS	Belize Primary School Monitoring System
BTC	Belize Technical College
BTTC	Belize Teachers College
CDU	Curriculum Development Unit
CEO	Chief Education Officer
CODE	Canadian Organization for Education Development
CXC	Caribbean Examination Council
DEO	District Education Officer
EEC	European Economic Community
GOB	Government of Belize
ICB	International Competitive Bidding Procedures
IDB	Inter-American Development Bank
ILO	International Labor Organization
IMF	International Monetary Fund
LCB	Local Competitive Bidding Procedures
MIS	Management Information System
MOE	Ministry of Education
MOF	Ministry of Finance
NCE	National Council for Education
ODA	Overseas Development Administration
PIU	Project Implementation Unit
PSIP	Public Sector Investment Program
PU	Planning Unit of MOE
SFIP	School Facilities Improvement Program
TCO	Technical Cooperation Officer
TESL	Teaching English as a Second Language
THS	Technical High Schools
TREP	Toledo Rural Education Project
TVE	Technical and Vocational Education
UCB	University College of Belize
UWI	University of the West Indies
VSO	Volunteer Service Organization

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BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT
Basic Data Sheet

	DATA	YEAR
A. GENERAL COUNTRY DATA:		
1. Population Estimate (Thousands)	184	1989
2. GNP per Capita (US\$)	1610	1989
3. Area ('000 Square Kilometers)	22	1989
B. POPULATION DATA:		
1. Crude Birth Rate (Per 1000)	36.5	1989
2. Crude Death Rate (Per 1000)	6.7	1989
3. Annual Rate of Population Growth (%)	2.6	1989
Urban	3.2	1989
4. Population under 14 years of age (%)	43	1989
5. Total Fertility Rate (Births per Woman)	4.83	1989
6. Infant Mortality Rate (Per 1000 Live Births)	47	1989
7. Life Expectancy at Birth (Years)	67.4	1989
C. EDUCATION DATA:		
1. Net Enrollment Rates (%)		
Primary Education	90	1990
Secondary Education	50	1990
Tertiary Education	33-38	1990
2. Public Education Expenditures:		
As % of Total Central Government Budget	21	1989
As % of GDP	5.7	1989
In per Capita US\$:		
Primary Education	231.5	1989
Secondary Education	418	1989
Tertiary Education	1012	1989
% of Total Education Budget spent on:		
Primary Education	59.2	1989
Salaries	95	1989
Secondary Education	24.1	1989
Tertiary Education	6.6	1989
3. Student/Teacher Ratio	23:1	1989
4. Illiteracy Rate (% of pop. 15+)	8.8	1970

SOURCE: World Bank, Social Indicators of Development, 1990
Belize Central Statistical Office
UNESCO, Statistical Yearbook, 1990

BELIZE

PRIMARY EDUCATION DEVELOPMENT PROJECT

LOAN AND PROJECT SUMMARY

Borrower: Belize

Beneficiary: Ministry of Education

Amount: US\$7.1 million

Terms: Payable in 17 years, including a 4-year grace period, at the Bank's standard variable interest rate.

Project Objectives

and Description: The proposed project supports the Government's development plans for primary education for the period 1992-97. It aims to improve the quality of instructional inputs in primary schools and increase student educational achievement levels by pursuing the following objectives: (a) introducing a new system for the training of primary school teachers in order to improve the quality and relevance of teacher training and increase the number of teachers with professional certification; (b) improving the quality, availability, and efficient use of educational facilities and resources for both teaching and learning; and (c) strengthening the planning and management of education to enable the Government to develop policies and implement programs to improve the cost-effectiveness of its expenditures on education.

The Teacher Education Component would: (a) provide 46 months of technical assistance to help introduce a new pre- and in-service training system under which 700 primary school teachers would become professionally certified, thereby increasing the percentage of certified teachers from 45 percent to 80 percent over the life of the project; (b) enhance the quality and relevance of teacher training, emphasize practical skills for effective instruction in a culturally and linguistically diverse society, introduce a system of salary incentives for teachers who complete the various stages of training, and help establish an in-service teachers training system on a part-time basis in outlying districts; (c) provide training for principals as key agents of change and instructional leaders at the school level; and (d) help strengthen the Belize Teacher Training College (BTTC) through an institutional twinning arrangement with a teacher training college abroad, travel and study for staff, and civil works and equipment.

The Education Development Component would have two sub-components. The first is a School Facilities Improvement Program (SFIP) under which the project would give priority to addressing the problems of overcrowded classrooms. It would support where appropriate, a combination of multiple shifts and construction and renovation of 105

classrooms in both urban and rural schools to relieve overcrowding, and the renovation, upgrading and construction of 10 principals' houses to help rural and remote communities attract principals to those schools. A second would: (a) strengthen the capacity of the CDU to develop standardized and culturally relevant school curricula and produce and disseminate learning materials compatible with the curriculum and the teaching of English as a second language; (b) support the implementation and monitoring of a new textbook loan scheme to provide all students a basic set of textbooks for use in school; and (c) help establish an achievement monitoring system for continuous classroom evaluation for feedback into policy analysis, teacher training and curriculum/materials development. Approximately 50 months of technical assistance would be provided, 18 months of fellowships and study tours, as well as civil works to expand the facilities of the CDU and build offices for a new Assessment and Evaluation cell, books, materials and equipment.

The Planning and Management Component would: (a) provide 42 months of technical assistance to help strengthen a new educational planning unit (PU) in MOE; (b) develop a new management information system and a school map; and (c) support special studies for planning and policy making. The component would also provide technical assistance and in-service training to help MOE strengthen its management of the education sector, in particular its financial management: budget process, budget monitoring and accounting systems. The component would include support of MOE's strategy of strengthening regional management and support services to teachers and principals through construction of new facilities and upgrading the resources of three education centers, now in temporary and inadequate facilities. Books and equipment would also be provided for the centers. The proposed project would be managed by a small Project Implementation Unit (PIU) staffed by Belizeans and located in MOE under the direct supervision of the Chief Education Officer. The Director of the PIU would manage the PIU team and coordinate the inputs of the long- and short-term consultants financed by ODA. The Director would also ensure effective cooperation, provided under the Belize Education Act between the MOE and the church organizations in implementing project objectives.

Benefits:

The project would improve the quality and effectiveness of primary education by: (a) increasing the percentage of certified primary school teachers from 45 percent to 80 percent; (b) renovating and building 105 primary school classrooms to relieve overcrowding and improve the teaching and learning environment; (c) providing to all primary school children a basic set of textbooks in the classroom; (d) revising and standardizing primary school curricula and constructing diagnostic and achievement tests for continuous classroom evaluation and feedback for policy, teacher training and curriculum development; and (e) strengthening the planning and management capacity of the MOE to make needed improvements in management information, research and analysis, and education and training of staff.

Risks:

There are two main risks. The first relates to the limited management capacity in MOE to implement the measures needed to

improve the quality and efficiency of the education system. This risk is addressed by providing support for a PIU under the CEO to plan and coordinate project implementation with MOE staff and by making available technical assistance and training to strengthen the management of government and church schools. The second risk is that project achievements may not be sustained after project completion. To ensure the sustainability of project achievements, MOE would approve the necessary policies and levels of recurrent budgetary support for key programs of teacher training, textbook distribution, and school facilities construction and maintenance.

<u>Estimated Project Costs:</u>	<u>Local</u>	<u>Foreign</u>	<u>Total</u>
	-----US\$ Million-----		
<u>Project Components:</u>			
Teacher Education	1.35	0.73	2.08
Education Development	3.12	3.37	6.49
Planning & Management	<u>1.02</u>	<u>0.97</u>	<u>1.99</u>
TOTAL BASE COSTS	5.49	5.07	10.56
Contingencies	<u>1.04</u>	<u>1.04</u>	<u>2.08</u>
TOTAL PROJECT COSTS a/	<u>6.53</u>	<u>6.11</u>	<u>12.64</u>

a/ Including taxes and duties.

<u>Financing Plan:</u>	<u>Local</u>	<u>Foreign</u>	<u>Total</u>
	----- US\$ Million-----		
IBRD	2.00	5.13	7.13
Government of Belize	4.24	0.0	4.24
ODA	<u>0.29</u>	<u>0.98</u>	<u>1.27</u>
Total	<u>6.53</u>	<u>6.11</u>	<u>12.64</u>

Estimated IBRD Disbursements:

<u>Bank FY</u>	<u>1992</u>	<u>1993</u>	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998</u>
	----- US\$ Million -----						
Annual	0.89	1.03	1.15	1.14	1.03	0.96	0.93
Cumulative	0.89	1.92	3.07	4.21	5.24	6.20	7.13

Rate of Return: N/A

Map: IBRD No. 17023R1

BELIZE

PRIMARY EDUCATION DEVELOPMENT PROJECT

I. THE SECTOR

A. Economic Setting

1.1 Belize is a small, sparsely populated country with an economy based on agriculture, incipient tourism and light manufacturing. In 1989 the national population was around 184,200, occupying an area of about 22,000 km². Per capita GDP was US\$1,610 in 1989. In 1990 economic performance continued to be strong. Growth of GDP is expected to reach 7 percent despite the oil price shock and declining prices for orange concentrate, one of Belize's important exports. In the short- to medium-term, the Belizean economy faces difficulties. More restricted export markets in 1991 together with a likely slowdown in investment and oil-induced inflation are likely to limit GDP growth to 3-4 percent. Pressure on the current account will be sustained. With traditional preferential markets for sugar, citrus and bananas increasingly uncertain, the outlook for 1992 and beyond is unclear; the boom years appear to be over.

1.2 During the 1980s the Belizean population grew at an average rate of 2.8 percent. Approximately half the population lives in urban centers. The main feature of the population is that 43 percent is under 14 years of age. This demographic characteristic has a heavy impact on the education sector. Emigration and immigration flows are also important forces affecting the population. During the 1970s and early 1980s an estimated average of 2,000 Belizeans annually emigrated to the United States, and it is generally held that the numbers of emigrants have increased in more recent years. The accepted estimate for the number of Belizeans living in the United States is 40,000 to 50,000. The instability of the Central American region has generated a flow of refugees to Belize from neighboring countries such as El Salvador, Guatemala, and Honduras. The official estimate of the refugee population in mid-1989 was 5,100 with an additional 25,000 economic migrants and displaced persons.

1.3 Although no estimates of income and wealth distribution exist, economic resources seem to be more evenly distributed in Belize than in most of the other countries in the region. The ethnic composition of the population is diverse, yet no single ethnic or cultural group is dominant. The population includes various groups of which the most numerous are Creoles (40 percent) and Mestizos (33 percent). Smaller groups are largely the Garifuna (Black Carib), Maya Indians, Mennonites, and East Indians. There is considerable linguistic diversity among the population. English is the official language, but each group also uses its own language, i.e., Creole, Spanish, Mayan, and Garifuna. This linguistic polyglot creates institutional problems in the early years as the pupils used to speaking their mother tongue are taught in English.

1.4 No regular data is published on unemployment, but the economically active population was estimated to be 56,600 in 1987. Broken down by economic sector, the largest employers are the agriculture sector with a declining share of about 32 percent of the active labor force; agroprocessing, manufacturing and transportation, with around 26 percent; and the Government sector, which employs approximately one-quarter of the active labor force. The unemployment rate appears to have remained stable since 1980, but only due to emigration. Male unemployment averages 9-11 percent but is higher in the northern part of the country and in Belize City (12-13 percent). There are no well-based estimates of labor market requirements or of the qualifications of the labor force. On the demand side, although recent reports concurred in their assessment that opportunities for skilled and technical workers in Belize will continue to expand with economic growth, the economy has generated few new job opportunities for technical or skilled workers. Nor is there evidence that foreign or domestic investment projects were aborted because of the lack of qualified workers. There appear to be ample semi-skilled and skilled construction workers for future investments in infrastructure and tourism. On the supply side, the central issue is one of quality of education and training. Given the relative youth of the population and the still low average levels of schooling, solid progress in developing basic education remains a prerequisite for sustained economic growth.

B. Education Sector

1.5 Education system. Belize's education system (Annex 1) consists of eight years of primary education. There is also a small pre-school program. At the completion of the primary level, students take the Belize National Selection Examination (BNSE) which determines their eligibility for entrance into secondary school, where places are limited. Roughly 60 percent of those taking the examination go on to the secondary level. Secondary education consists of four years of general studies. Technical-vocational training of varying lengths is offered to students following primary school or after three years of high school. At the tertiary level, which includes sixth form, several institutions provide two-year courses of academic and technical training in business studies, agriculture, engineering trades, and other professional fields. University studies are offered in Belize at the University College of Belize which offers first degree programs in business and education. However, most students attend universities abroad, mainly in the United States or at the University of the West Indies (UWI).

1.6 Enrollment. Enrollment at the primary level in Belize compares favorably with other Central American and Caribbean countries. An estimated 46,023 pupils were enrolled in government and government-aided primary schools in the school year 1990-91 (Annex 2). This means that about 90 percent of the estimated total population aged 5-14 attended school. Half of all young children progress to secondary school, and between two-thirds and three-quarters of these are thought to complete their studies. Male and female enrollments are about evenly distributed. The evidence suggests that some 80 percent of children beginning primary school progress through the eight grades. This relatively low drop-out rate may hide the fact that students leaving the system are being replaced by the growing immigrant student population. However, this might only be confirmed after MOE begins collecting

dropout statistics. Belize does not collect statistics on repetition either, but from estimates of gross progression rates which are in the range of 90 percent, it would appear that very few students repeat an academic year at the primary level. Population growth and migration are projected to increase school enrollments by approximately 3 percent annually over the next five years; government education planning will take this increase into account.

1.7 Because of Belize's widely dispersed population, 68 percent (160) of the 235 government and government-aided primary schools are classified as rural, 34 of which are in remote outlying areas of the country. Rural schools account for 47 percent of total enrollment. About a quarter of all rural primary schools (41) have fewer than 50 pupils enrolled, and a further quarter count enrollment between 50 and 100 pupils. The aggregate student teacher ratio is about 23 to 1. This includes teachers receiving training full-time; if these teachers are excluded, the ratio of students to active teachers is 26 to 1, which is reasonable in view of geographic factors. Teachers and principals in rural areas face special challenges such as living in the rural environment, teaching children of several grades in the same class, and teaching English as a second language; the first language is Spanish, Creole, or Kekchi/Maya for many rural students. Rural and remote schools are also the most disadvantaged in terms of certified teachers (35 percent) and textbooks and other learning materials.

1.8 Management and Policy. The Ministry of Education, Youth, Sports and Culture (MCE) is responsible for managing the national education system, although it shares responsibilities with churches of various denominations in a unique partnership with regard to primary and secondary education (para. 1.10). MOE is small, consisting of 12 professional staff in the headquarters in Belmopan and the districts, and another three persons based in Belize City (Annex 3). While authority in all educational matters rests with the Minister of Education, considerable responsibility is delegated to the Permanent Secretary and the Chief Education Officer (CEO). The operational capacity of the MOE is limited by shortcomings in human resources, planning, financial management, and program monitoring including management information.

1.9 Policy decisions on education are made by the Minister with the support of the National Council for Education (NCE). The Council consists of the CEO and 15 members appointed by the Minister from among private, church and labor organizations. The NCE has been largely inactive, but the present government has reactivated it and made it more representative of those groups concerned with education. It also plans to make full use of the technical assistance in the proposed operation to support MOE in strengthening the policy-making process so that policy statements can be translated into realistic operational plans and programs based on financial and management capacities. MOE has already begun to redefine its education policy framework. In April 1991, it adopted a new Education Act and is preparing education rules which clarify and strengthen the role of MOE in managing the education system in partnership with the churches.

1.10 Church-State Partnership. A key feature of the Belize educational system is the partnership between different religious denominations and the Government in the delivery of primary and secondary educational services.

The role of the churches in education and their relationship with the Government was first formalized in the Educational Ordinance of 1962, which has since been amended periodically, most recently in April 1991. Under the partnership agreement, the Government establishes educational objectives, pays teachers' salaries, contributes half the costs of facilities and their maintenance, develops curricula and administrative standards, trains teachers and administers selection examinations at the end of primary school. The church organizations are responsible for managing their schools, school maintenance and all personnel matters. As a consequence of the new Education Act, the role of the CEO is strengthened in managing the education system, although consultation with church school managements on major policies is also required.

1.11 The church-state partnership for providing education has generally been fruitful. The arrangement has saved public sector resources by leveraging government spending on education and has promoted pluralism and diversity in a sociologically complex society. However, the partnership has been more the product of spontaneous developments, with the Government reacting to church initiatives, rather than of a carefully planned strategy to fully take advantage of the comparative strengths of the MOE and church organizations in the delivery of education services. The project will provide MOE the opportunity to strengthen the effectiveness of the church-state partnership in education by effectively involving church managers in the planning, implementation and monitoring of project activities. MOE plans to include church managers as members of the Project Management Committee and the School Facilities Improvement Program Committee, and to encourage their participation in implementing all project activities. It also intends to include them in the project's management training and team building workshops where the issues of church-state partnership can be explored and agreements reached on strengthening cooperation in support of education.

1.12 Education Finance. The US\$15.1 million level of education expenditures (1989) reflects the importance given to education by the current government. The share of public education expenditures in GDP and in the central government budget for 1989 were 5.7 percent and 21 percent respectively. Despite the important role played by the church schools in the educational system, the bulk of financing comes from the central government. In the 1980s Belize's educational expenditures were high among countries in Latin America and the Caribbean. The education sector, however, receives a modest 4.7 percent of the Government's public investment program annually. This share, equivalent to US\$0.9 million (1990 US dollars), must be at least doubled during the decade in order for MOE to meet growing requirements for repairing, expanding and maintaining primary school facilities and supplying textbooks. The distribution of MOE expenditures is generally appropriate. In 1989, about 60 percent of the total educational budget was allocated to primary education, equivalent to a per capita expenditure of US\$226 per student; about 24.1 percent of the budget went to secondary or US\$418 per student; and 6.6 percent or US\$1,012 per student went to tertiary education (Annex 4). Only seven percent of total expenditures is spent on administration. About 95 percent of the primary education budget is spent on salaries.

C. Issues in Primary Education

1.13 In order to improve primary education--having attained relatively high rates of enrollment retention and progression--the Government must improve the quality of education, enhance educational resources, and increase the effectiveness of educational management. Belizean authorities generally acknowledge--albeit without comprehensive hard data--that the education system suffers from low quality performance. Poor quality is evidenced by low levels of reading ability, English comprehension and knowledge of math among primary school graduates. Even the more capable students--those who gain access to secondary schools--are ill-prepared for work at the first year level. There are many factors accountable for the system's poor performance. The system has a serious shortage of adequately trained teachers, most primary students do not have access to a basic set of textbooks, teachers do not follow a standard curriculum and generally lack the minimum necessary instructional materials for teaching, the system is not meeting the early primary education needs of Belize's non-English speaking children, the system lacks instruments for assessment and evaluation of school performance in order to identify needed improvements and student achievements, and most primary school facilities are overcrowded and/or in need of expansion or repair. MOE's operational capacity to address these problems is limited by staff size and budget resources. However, there is considerable scope for improving primary education in the years ahead, provided MOE improves its education planning and management and adopts a clear set of policies which can be translated into realistic and affordable operational plans and programs. These needs are discussed more fully below.

1.14 Primary School Teachers. Only about 50 percent of Belize's 1,941 primary school teachers are qualified by MOE standards, which require three years of post-secondary training, including one year of practice teaching. The majority of teachers have received no specialized teacher training. Roughly two-thirds of the teaching force is under 30 years of age. The limited prospects of receiving training and salary increments have contributed to demoralization of the teaching cadre and attrition from the teaching service. Nevertheless, this age profile indicates that training teachers represents a good long term investment in education quality improvement. The Belize Teachers College (BTTC) provides teacher training for primary school teachers, but the training is mainly academic and theoretical with insufficient attention paid to classroom teaching skills. BTTC also has a shortage of qualified instructors and teaching resources. Until recently, there was no plan to address the shortage of trained teachers and limited training resources. There were also no incentives for good teachers; salaries were below those of other civil servants with similar training. Government approved a salary increase in 1988 which appears to place teachers in a more favorable position within the civil service. However, working conditions in rural areas are not comfortable. The recruitment of teachers for assignments in rural areas is especially difficult because of inadequate housing. MOE would like to introduce a new teacher training system to handle the backlog of untrained teachers. In 1990, BTTC introduced a new one-year pre- and in-service teacher training course to expedite teacher training. The proposed

project would assist MOE in establishing a new teacher training system for upgrading existing teachers and training new teachers for primary education.

1.15 Textbooks and Instructional Materials. Most students do not have access to a basic set of textbooks for math, reading, and language, few have the use of textbooks for science and social studies, and fewer still can obtain books for reading enjoyment from their schools. Primary textbooks are not standardized, and since selection is determined by each school principal, a wide variety is being used in the schools. With few exceptions, textbooks are imported, and prices are generally high. Parents are responsible for purchasing textbooks for their children. This means that students from low-income households cannot afford to obtain textbooks, even where they are available for purchase. In rural and remote areas, textbooks are generally not available. MOE has not had a textbook policy that has addressed these issues until quite recently. In December 1990, the Minister of Education approved an initial policy on textbooks which addresses some of the key textbook issues. A textbook committee was also appointed to provide guidance on future policies and programs to deal with textbook issues. Since 1989, Government has been implementing a textbook project funded by the European Economic Community (EEC) and administered by Ranfurly Library Service which has enabled MOE to import 108,000 textbooks and sell them to parents at highly subsidized prices. If the project is to realize its full potential, MOE will need to make improvements in the book distribution system and devise a plan to provide textbooks on a loan basis to students of low-income households. It will also need to develop a sustainable longer-term textbook program which will provide primary school students with a basic set of textbooks.

1.16 Curriculum Application and Development. The primary school curricula used in Belize were developed during the late 1970s and have undergone revisions and updating over the years. The curriculum guides are generally well prepared, although they require revisions and updating to incorporate new learning objectives and facilitate teaching and assessment. The science curriculum especially needs to be revised to make it less academic and to integrate health, agriculture and environmental studies curricula. Training and dissemination activities carried out by MOE's Curriculum Development Unit (CDU) and the BTTC have had some success in familiarizing teachers with the curricula. However, these efforts have not been at the level required to ensure that the curricula are followed in primary school teaching. MOE needs to develop a policy for curriculum development and for training teachers to use its curriculum guides. It also needs to ensure that textbooks approved for use in the schools support curriculum goals and are culturally sensitive to Belize. MOE plans to develop diagnostic tests based on the curriculum to assess teaching and learning in the classroom and to take remedial action based on the results. To help the CDU achieve its goals, the project would provide technical assistance and provide support for staff upgrading, civil works and equipment for providing curriculum guides and teaching materials.

1.17 Language of Instruction. The multilingual composition of the Belize population causes instructional problems for students and teachers in the early years of primary schooling. Children whose mother tongue is not English are confronted with English as the language of instruction. For these children, the first years of schooling are crucial for making the transition to English if they are to benefit from school at all. The failure of many

non-English speaking children to understand the language used in the classroom contributes to poor student performance. MOE has attempted to address this issue in several ways. The CDU has produced Teaching English as a Second Language (TESL) readers with teaching handbooks for three grade levels, and has conducted in-service training courses on TESL for a corps of teachers. MOE has also undertaken the Toledo Rural Education Project (TREP) which aims to produce educational materials and train teachers to work with the disadvantaged children in remote Maya/Kekchi villages in the Toledo district. MOE needs to evaluate its TESL instructional programs in the schools and to develop TESL readers for the use of early grade levels. The BTTC also needs to re-examine its instruction in TESL for teachers in order to better equip them for teaching the Language Arts curriculum.

1.18 Assessment and Evaluation. There is no standardized testing in primary education in Belize. Schools prepare their own end of year tests which are used in order to promote students. Failure rates of these tests are low and few students repeat an academic year. It is generally recognized that these tests do not provide teachers, administrators, and parents with reliable information which would permit them to judge the effectiveness of Belize's education system and to adopt measures to address deficiencies. MOE developed and pilot tested diagnostic tests in language and numeracy at the primary level in 1990, and from the results, it is clear that more time and resources, both financial and technical, are needed to develop tests of acceptable quality and reliability. The Belize National Selection Examination (BNSE), given after eight years of schooling, serves as the basis for selecting students for secondary school. For those students not selected, it also serves as a school leaving certificate. MOE would like to modify the BNSE so it may serve both as a primary school achievement and secondary school selection examination. The academically rigorous Caribbean Examination Council (CXC) examinations are not presently well suited for measuring the achievement levels of the majority of Belizean secondary school students; the Government would like to introduce a secondary school leaving certificate examination, to be taken concurrently with the CXC examinations.

1.19 School Facilities. Many of Belize's 236 primary school facilities are in need of either repair, replacement, or extensions to relieve overcrowding. An MOE survey conducted during project preparation revealed that: (a) overcrowding is severe in both urban and rural schools. At least 75 additional classrooms are currently required to relieve overcrowding; and (b) about 60 classrooms need to be replaced; another 90 classrooms require major repairs and many more require minor repairs. The costs of meeting the current needs is estimated at US\$6 million and it is thought that a further US\$11 million will be called for in the next five years. These estimated capital investment requirements are beyond what Belize can currently afford. MOE spent only US\$0.5 million in each of the last two years on school construction and renovation. Church managements are believed to have roughly matched the figure. The Caribbean Development Bank has also provided some funding. However, it is clear that the work done has not nearly met all of the needs. MOE now recognizes the importance of beginning to address the more urgent needs for improving school facilities. To this end, the proposed project would help establish a School Facilities Improvement Program (SFIP) to mobilize and co-finance the cost of school improvements with the managements of the denominational schools and the respective communities. MOE also plans to initiate a pilot scheme to reduce overcrowding in selected schools through

multiple shifts. Belize has a school maintenance system which should be improved to increase cost-effectiveness and accountability. Approximately US\$150,000 was spent annually by MOE on school maintenance over the past three years. Finally, due to population shifts, Belize needs to rationalize school locations to the extent feasible, merging some under-attended schools, closing others, and building new facilities for children who live beyond a reasonable distance from school.

1.20 Planning and Management. MOE's operational capacity is limited by shortcomings in planning and program monitoring, including management information, financial planning, and budget control. Previous attempts to establish a data base for educational planning and management have had limited success. The present data base on education is poor and unreliable and needs to be replaced by a simpler and more manageable one. MOE also lacks a school map necessary for planning new facility construction. Following a recommendation from the World Bank, MOE established a small Planning Unit (PU) in 1990 which is responsible for collecting and analyzing information on education for planning and management purposes. A major output of the PU has been a Five-Year Plan for Education. In addition, MOE has a small professional staff which is responsible for a wide range of activities. Its managers are overburdened with day-to-day administration and troubleshooting and have had little or no time to plan and manage change. Decision making is highly centralized and implementation capacity at both the district and the school level is underutilized. There is also insufficient coordination and collaboration among key units and between the MOE and the managers of church schools.

1.21 In order to achieve the proposed education reforms and improvements at the school level, MOE needs to strengthen the capacity of its headquarters' management team, District Education Officers (DEOs), church school managers, and school principals. These officials are collectively responsible for delivering school administrative, supervisory, and educational support services, as well as for promoting effective community participation in the schools. MOE also needs to upgrade the facilities of some of its District Education Centers, which serve both as offices for the DEOs and teacher resource centers. The increased decentralization of service delivery (textbooks, teacher training, teacher supervision, curriculum orientation, and data collection) will require MOE to rationalize the planning and management responsibilities and support functions centered around the District Education Centers.

D. Government Strategy

1.22 The Government's Education Plan for the period 1991-95 proposes to expand educational opportunity and make qualitative improvements in educational services in keeping with the proposed project. Specifically, it aims to expand and upgrade educational facilities and infrastructure, substantially increase the number of certified teachers in the education system and improve their training. It also plans to provide teachers with improved incentives to work in rural areas and to develop a posting policy which would increase the number of trained teachers in rural areas. Curriculum and examination improvements are envisaged as are plans to rationalize the cost and availability of textbooks and increase their local production. Government also proposes to improve the facilities and staffing

of district education centers to enable better supervision and support of primary schools. A high priority is placed on improving planning and management in the sector including providing training for school principals who are at the front line in managing the education system.

E. Bank Strategy

1.23 The Bank's country assistance strategy and program of assistance to Belize has been aimed at: (a) supporting the Government's efforts to develop Belize's basic infrastructure in order to facilitate effective utilization of the country's vast natural resources; (b) assisting in the development of Belize's human resources, including institution-building needs that are critical for sustained economic growth; and (c) promoting the development of the private sector as the principal engine of economic growth. The Bank has made four loans to Belize. The first in 1983 was for a Road Maintenance and Rehabilitation Project which is now fully disbursed. The Bank's on-going operations comprise a Power Development Project, a Second Road Maintenance and Rehabilitation Project and an Agricultural Credit and Export Development Project. Consistent with the above strategy, the Bank's future program of assistance will consist of the proposed Primary Education Development Project, a Power Project, Municipal Infrastructure Project and a Forestry Development Project. The proposed operation will support the human resources development objectives by improving the quality of primary education.

1.24 Key lessons learned from previous Bank experience in the Caribbean region and in the primary education subsector have been incorporated into the design of the proposed project. First, small countries need a good deal of technical assistance, as is provided in this operation, to supplement the very limited administrative and technical manpower available for project implementation. An institutional twinning arrangement with a School of Education in the United Kingdom and long- and short-term consultancies and training are provided for with co-financing from ODA. Second, the introduction of education reforms is a complex and lengthy process requiring strong and innovative leadership by the Ministry of Education in partnership with other public and private groups at all levels of the society. The proposed project has a strong management and institution building component to strengthen MOE's leadership, improve collaboration between government and church managements, and upgrade the administrative and instructional capacity of school principals. Third, the sustainability of improvements in teacher education, curriculum development, textbook availability, assessment, and school facilities requires that governments make increased provisions in their education budgets for non-salary expenditures. The Belize Government has agreed to steadily increase its annual budget allocations for these expenditures during project implementation which should greatly enhance the prospects of sustaining these improvements after the project is completed.

II. THE PROJECT

A. Project Origin

2.1 The proposed project would be the first Bank operation in the education sector. It grows out of a Bank Education Sector Review (Report No.

7505a-BEL) dated January 24, 1989. The Government initiated project preparation in March 1990. It appointed a Coordinator for project preparation and three task forces. The Coordinator and task forces were assisted by an ODA consultant and short-term education specialists. Bank missions in May, September and November 1990 contributed to project preparation. Pre-appraisal took place in April 1991 and appraisal in June 1991. ODA participated in both the pre-appraisal and appraisal missions.

B. Project Objectives

2.2 The project aims to improve the quality of instructional inputs in primary schools and increase student educational achievement levels by pursuing the following objectives:

- (a) introducing a new system for the training of primary school teachers in order to improve the quality and relevance of teacher training and increase the number of teachers with professional certification;
- (b) improving the quality, availability and efficient use of educational facilities and resources for teaching, learning and assessment in primary schools; and
- (c) strengthening the planning and management of education to enable the Government to develop policies and implement programs to improve the cost-effectiveness of its expenditures on primary education.

2.3 Project Description. The project has three inter-related components. The first focuses on improvements in the teacher training system and upgrading the knowledge, skills, and overall competence of primary school teachers. The second component consists of support for improving the classroom environment, distributing textbooks, improving curricula, and designing and implementing new examinations for diagnosis and measurement of student achievement and remediation of learning difficulties. The third aims to improve educational planning and management through the introduction of new methods and systems for monitoring, budgeting and evaluating educational programs.

C. Project Components

Teacher Education Component (US\$2.50 million)

2.4 Strengthening the Teacher Training System. The proposed project would assist MOE in introducing a new system for the training of primary school teachers which would: (a) increase the number of professionally certified teachers in the primary schools; (b) enhance the relevance and the quality of teacher training; (c) provide adequate salary incentives for teachers who successfully complete training; (d) improve efficiency in the training of teachers; and (e) train principals to provide instructional leadership at the school level. The project would also strengthen the capacity of BTTC through structural reorganization and staff development to

introduce a new system of teacher training operating part-time and full-time (Annex 5).

- (a) Increasing certified teachers. The proposed project would help introduce a new training system under which approximately 700 primary school teachers would become professionally certified, thereby increasing the percentage of certified teachers in the system from 45 percent to 80 percent over the life of the project.
- (b) Enhancing quality and relevance. The project would also enhance the quality and relevance of teacher training by providing technical assistance for course design, instructional materials preparation and upgrading of the BTTC teaching staff. Pre- and in-service courses (both part-time and full-time) would place greater emphasis than at present on developing teaching skills. These would include multi-grade teaching, classroom management, methods of teaching the syllabi and familiarization with curricula, and assessment and evaluation of pupils' learning. Advanced training courses for certified teachers and principals would concentrate on higher level skills required by the system.
- (c) Improving incentives. The new teacher training system would provide salary incentives for teachers who complete the various stages of training. The total cost of these salary increases will result in an estimated annual net increase in the recurrent budget of only 1-2 percent during the project. This relatively modest increase is due to the fact that the bulk of teachers trained will be trained at the intermediate level and will be placed on a scale lower than the current scale for teachers with advanced training, and because the effect of part-time upgrading will be to stagger salary increases over two years.
- (d) Improving efficiency. One of the main objectives behind the design of the new system is to reduce reliance on full-time in-service training to produce trained teachers. The current system requires that teachers be taken out of the system on full salary for two years to undergo training: it also has had high rates of repetition and drop-out, implying that many teachers have taken more than two years to complete the training. The new system introduced under the project would phase out entry of unqualified recruits into the teaching profession, reducing over the medium term the burden on the in-service system of upgrading teachers. The length of the full-time in-service course would be reduced to one year. Many teachers would train part-time and thus not leave the system during training.
- (e) Training principals. The project would support in-service training for about 236 primary school principals. As the key agents of change at the school level, principals must adopt new approaches to analyzing and responding to problems and concerns of teachers in the field, and develop a wider view of the teacher's role in understanding the community and the social issues which

lie therein. They must learn to develop their own positive responses rather than the more traditional normative responses to teachers' daily concerns and activities. The overall emphasis is therefore on developing the principals' professional sense of identity and enhancing their instructional leadership role.

2.5 Planning and Delivery of Teacher Training. BTTC is responsible for planning and delivering all primary school teacher training, part-time and full-time. Teacher orientation workshops for the adoption of new primary curricula are conducted in conjunction with the CDU. BTTC will be reorganized and strengthened to increase its planning and delivery capability. An additional Vice Principal-Director of District Programs will be appointed to manage in-service training for teachers in the districts, and field supervision and lecturer vacancies will be filled. The posts of Heads of Department for Resources and Examinations will be established to respectively improve materials production and delivery and teacher assessment. Six other staff members will take responsibility for the delivery of part-time training in the districts; one will be assigned per district. The part-time courses will be supervised and delivered in the districts with the assistance of District Teams. These will comprise about five members per team (depending on the district) and include experienced principals and teachers as well as district Education Officers. Each team will be coordinated by the BTTC district coordinator. Course planning and materials preparation will take place at BTTC, and the part-time courses will be given four days each month at regional education centers plus another three weeks during the school summer recess. The commonality of course content between the in-service and pre-service courses will facilitate preparation of the syllabi and course modules. The Planning Unit of the MOE will determine the intake of the pre-service course in accordance with estimates of net new teacher requirements.

2.6 Project Assistance. Through ODA, the proposed project would provide 24 months of technical assistance from a Teacher Education Specialist to support the teacher training component, and six months for the planning and supervision of in-service district training courses. Three volunteers from the Volunteer Service Organization (VSO) of the United Kingdom, with appropriate qualifications and experience in education, would also be provided for a period of 24 months each, to support in-service training in the districts. The project would also support 14 months of overseas travel and study for staff from BTTC and other training staff to update and consolidate their skills in distance learning, management of teacher training, pupil assessment and professional development, and learning resource management. This assistance to BTTC will form part of a package of technical support, intersecting teacher education, curriculum development, and assessment and education planning, delivered through a U.K school of education. The project would, in addition, cover the costs of civil works, instructional materials, vehicles, and equipment for BTTC. Prior to negotiations, the Government confirmed it had approved the proposed changes to the system of teacher training, certification, and remuneration developed for the project (para. 5.1 (a)).

Education Development Component (US\$7.75 million)

2.7 School Facilities Improvement Program (SFIP). The project would support a SFIP under which MOE would address the problems of overcrowded classrooms and the repair and maintenance needs of primary school buildings in urban and rural areas. MOE has developed policies and procedures for the operation of the SFIP, acceptable to the Bank. The survey of school facilities conducted during project preparation has led to the identification of facilities in need of attention. The proposed project would support the civil works, equipment and furniture required for school construction, repair and renovation. The SFIP would give first priority to addressing the overcrowding problem in schools which also need major repairs. To this end it would support construction of about nine new schools with a total of 55 new classrooms in both urban and rural schools. Eleven existing schools under renovation/ extension would receive 50 new classrooms. In addition, four existing principal houses would be renovated/upgraded, and six new principal houses would be constructed. Annex 6 lists the schools which have been given priority status in the SFIP. This list will be updated regularly in the light of improvements made in school facilities.

2.8 A small committee under the chairmanship of the CEO would review and approve each proposal for renovation and repair of schools under the SFIP. The Committee would be appointed by the Minister of Education and include inter alia representatives of the managements of both government and church schools. MOE would contract out the civil works to firms and individuals, utilizing the services of an engineering/architectural firm for tendering, bid evaluation, supervision of works, and related tasks.

2.9 In conjunction with new investments for improving school facilities, MOE plans to increase its annual allocation for operations and maintenance from the current level of US\$150,000 equivalent to US\$300,000 equivalent beginning in 1993. At negotiations, the Government agreed to sustain a minimum annual allocation of US\$300,000 equivalent in real terms in each fiscal year for operations and maintenance of school facilities beginning on April 1, 1993 and continuing throughout project implementation, and to prepare an operations and maintenance plan for all primary schools, acceptable to the Bank, by December 31, 1992 (para. 5.2 (a)).

2.10 Multiple-Shift Schooling. In addition to investing in school facilities improvement, MOE will experiment with multiple-shift schooling as an alternative for dealing with some overcrowded schools. To this end, it will design and implement a pilot scheme of multiple-shift schooling in the school year beginning September 1993 involving three schools where overcrowded classrooms are a serious obstacle to effective teaching and learning. The multiple-shift pilot scheme would be designed by the Planning Unit in consultation with parents, teachers, and other interested parties and its economic and social costs and benefits would be evaluated. The project would provide technical assistance if needed, to help design and evaluate the scheme. Decisions on investing in building additional classrooms in these and other schools will take into account the outcome of the scheme.

2.11 Curriculum Development and Application. The project would help strengthen the capacity of the CDU to develop standardized school curricula and produce and disseminate learning materials compatible with the curricula. Through technical assistance and staff training, it would help CDU over the next five years to achieve the following five main objectives:

- (a) prepare a curriculum policy for primary education for approval by the NCE to guide the preparation of curricula and the training of teachers in their use;
- (b) update selectively the primary school curricula in math, language arts, social studies, and science, and develop curriculum guides or schemes of work for all grade levels as well as for multi-grade instructional situations;
- (c) produce and disseminate revised teaching guides and instructional materials as well as socially/culturally relevant TESL readers and other materials not available for purchase;
- (d) help prepare and conduct pre- and in-service training courses for teachers, principals and other education officers to ensure that the curriculum and learning materials are appropriately used in the school; and
- (e) develop a language arts program for use in teaching English and other subjects to students who learn English as a second language.

2.12 The project would provide 30 months of technical assistance to the CDU by a General Educator (24 months) and short-term curriculum and educational materials development specialists. A TESL specialist would assist MOE to complete on-going projects of materials development and training in language arts. The training would be integrated in the pre- and in-service training courses for teachers being developed under the teacher training component of the project. In addition, CDU would receive specialist assistance in textbook writing, design, and printing for locally produced learning materials. The project would also help CDU to improve the printing, storing, and distribution of learning materials by expanding its current facilities, which are deemed inadequate, and providing additional equipment and a vehicle. The Canadian Organization for Education Development (CODE) has agreed to provide CDU essential equipment as a parallel contribution to the project. Finally, 18 months of training and travel and study are provided for CDU staff to visit other education institutions abroad to learn about curriculum development activities and resources in other countries.

2.13 Textbooks and Teaching Materials (Annex 7). The proposed project would assist MOE in implementing a new textbook program in support of the Government's newly adopted goal of providing every child in primary school access to a basic set of textbooks. It would also ensure the sustainability, with modifications, of the "Books for Belize" textbook distribution program undertaken with EEC/Ranfurlly Library Service which will terminate after 1993. The new program would function as a textbook loan scheme under which MOE would initially provide textbooks in math, reading, and English to all primary

school children in pairs at a modest rental cost per book. The income derived from the loan scheme would be kept by each school rather than transferred to a central fund, and would be used by the principal and the teachers to purchase other books and educational resource materials for their schools. Students who could afford to purchase their own set of textbooks would be encouraged to do so, thereby improving the student to textbook ratio. To facilitate the implementation of the program, MOE has already adopted important policy measures such as approving a limited list of textbooks for use in the schools. This list would limit the choices open to teachers and principals and enable MOE to purchase textbooks in bulk from local and foreign publishers at a large discount. The ultimate goal is to improve the textbook availability ratio and lend textbooks to all students. The Government has agreed to adopt a policy for permitting each school to use textbook loan fees collected from parents to purchase additional textbooks or other instructional materials. At negotiations, assurances were obtained that this policy would be adopted by May 31, 1992 (para. 5.2 (b)).

2.14 The proposed project would support the textbook loan scheme over five years, by assisting MOE both in purchasing sets of textbooks from local and foreign publishers and in distributing them to primary school students through the Government Bookstore. The proposed project would support the textbook loan scheme by assisting MOE in phasing in budgetary support for textbook purchases over a five-year period at the rate of 20% annually beginning in the 1992/93 school year. It would also provide short-term technical assistance to MOE to conduct studies of alternatives for reducing the costs of textbooks through bulk purchasing, savings in printing and reprinting, and cost-effective shipping and distribution. The estimated cost of the scheme in the first five years including all contingencies would be roughly US\$1.25 million. By the sixth year, MOE's support of the textbook program would increase to roughly US\$250,000 annually, representing about 3 percent of the cost per primary school student (US\$225). In addition, ODA will provide book aid in order to improve access of the primary schools to classroom texts and general readers as well as teacher education books for the education resource centers in the districts. VSO will provide 24 months of technical assistance to the Government Book Store to design, implement and manage a distribution system and book rental scheme.

2.15 Examination Reform and Assessment. The project would provide technical assistance, training, and other support to MOE for the planning and implementation of reforms of its examination system. In order to plan and implement these reforms, MOE has created a new Examinations Unit which will be staffed by two professionals and administrative support personnel. As a first priority, MOE will begin work on the development of diagnostic tests to measure student achievement in math and reading at the junior and middle levels of primary schools. The diagnostic test results would provide the baseline for measuring the progress achieved during the next five years and afterwards in improving the quality and achievement levels of primary education. The project would assist MOE in introducing improvements in the BNSE and in developing a national secondary school leaving examination as a complement to the CXC. The assistance of the General Educator and twelve months of short-term assessment specialists are provided under the project to inter alia: (a) help plan, implement, and interpret diagnostic and achievement

tests; (b) organize and conduct workshops to train teams of item writers in science, mathematics, English, Spanish, and the humanities; (c) develop a system for processing the national examinations on a microcomputer; and (d) help plan and implement an extensive public awareness-raising campaign to keep the public informed as to the purpose and nature of examination reform in Belize. The project would call upon the staff of the CXC for technical assistance in planning improvements in the BNSE and designing the national secondary school leaving examination. The project would further provide fifteen months of short-term overseas training to the staff of the cell in the principles and practices of assessment. Finally, the project will cover the costs of civil works, furniture, and equipment for the offices of the new Examinations Unit.

Planning and Management Component (US\$2.39 million)

2.16 This component consists of support to MOE in three areas: (a) establishment of an Education Planning Unit; (b) strengthening MOE management; and (c) building up education resource centers in the districts. Each of these sub-components is described below.

2.17 Establishment of an Education Planning Unit (Annex 8). The project would help strengthen a small Education Planning Unit which was established by MOE in 1990. The unit is currently headed by the Deputy CEO in MOE who is assisted by one junior planning officer. A second officer at a senior level (Education Officer-Planning) will be recruited by MOE before the end of 1991. An ODA-financed Technical Cooperation Officer (TCO) statistician has been working in the unit since September 1990 assisting MOE in establishing a new management information system and training the Planning Unit officer. The education planner/statistician would continue to provide technical assistance under the project (24 months) and on-the-job training to Planning Unit staff. This training would be supplemented by 18 months of fellowships and study tours. The project would also provide equipment and materials to facilitate data collection, processing and dissemination by the MIS. Three main tasks of the Planning Unit will be supported under this sub-component:

- (a) Management Information System (MIS). The project would provide technical assistance to MOE in preparing and implementing a new MIS to replace the current Belize Primary School Monitoring System (BSMS).
- (b) School Mapping. The education planner/statistician would help MOE to prepare and periodically update a school mapping survey for primary and secondary schools. The main purpose of the survey would be to help MOE plan new school sites, school amalgamations, and closings in light of shifts in enrollment and student-teacher ratios, population growth, and physical conditions of schools and roads. An initial mapping survey was completed during project preparation to facilitate planning for the proposed SFIP. The school map would be completed in the first year of project implementation on the basis of population data and other information which will become available from the 1991 Census.

(c) Special Studies. The Planning Unit would conduct several studies for planning and policymaking over the next five years. For example, one major study would focus on the demand and supply of teachers, assess MOE's staffing policies and practices, and examine the incentive system for attracting teachers to work in rural and remote schools. A second study would complete the survey of primary school facilities and develop a five-year plan for school construction. Six months of technical assistance would be provided to assist the Planning Unit staff conduct these studies. The terms of reference for the studies will only be prepared when the Planning Unit is fully operational.

2.18 Management Strengthening. The project would also provide six months of technical assistance and in-service training to help MOE strengthen its management of the education sector. The assistance would be of two main types: (a) general management assistance to improve MOE's systems and methods for setting objectives, monitoring and evaluating performance, and increasing motivation and staff productivity; and (b) financial management assistance to improve MOE's budget processing, budget monitoring, and accounting systems. A key objective under (a) would be to strengthen management at all levels of the education system, especially in the districts and in the schools; another objective would be to enhance the cooperation between MOE and the church school managers in planning and implementing improvements in the education system. Under (b) the key objective would be to help MOE more efficiently mobilize and use resources for education.

2.19 Education Centers. Finally, in support of MOE's strategy of strengthening regional management and support services to teachers and principals, the project would build new facilities and upgrade the resources of three education centers now in temporary and inadequate facilities: Punta Gorda (Toledo District), San Ignacio (Cayo District) and Dangriga (Stann Creek District). The education centers to be constructed under the project would include an office for the district education officer and facilities (library, materials production/meeting room, and equipment for a teacher resource center. The project would also finance the civil works, furniture and equipment for the centers. MOE would place the education centers under the direct responsibility of the DEOs, to be assisted by the Assistant DEOs. It would also arrange for the staffing of the resource centers by Assistant DEOs or others in the communities. Additional support for the teacher resource centers in the form of equipment, supplies and books would be provided by CODE. The three VSOs who will support in-service training in the districts (para. 2.6) would also be posted at the teacher resource centers to conduct teacher training workshops.

III. PROJECT COSTS, FINANCING, MANAGEMENT AND IMPLEMENTATION

A. Project Costs and Financing

3.1 Project Costs. The total cost of the project, including duties and taxes, is estimated at about BZ\$25.2 million or US\$12.6 million equivalent. The breakdown of costs of the project by component, categories of expenditure and sub-components is summarized in Tables 1, 2, 3 and Annexes 12-17.

3.2 Basis of Cost Estimates. Estimated costs for civil works are based on current unit costs for construction which vary from US\$35 to US\$40 per sq. ft. of gross floor area of construction. Estimated rehabilitation costs were calculated based on a consultant study. These costs are reasonable for comparable Bank assisted construction in the Caribbean region. Costs of professional services for design, preparation of drawings and tender documents, and on site supervision of construction reflect the scale of fees established for similar services provided by local architectural and engineering consulting firms. Estimated furniture and equipment and vehicle costs are based on current c.i.f. unit prices, adjusted to include local transportation costs, and exclude direct taxes. Estimates for technical assistance and studies are based on ODA's recent costs for these activities within and outside Belize. Estimated costs for the salaries of additional staff are based on local pay scales including standard allowances and other applicable benefits.

Table 1: COSTS BY COMPONENT

Component	<u>Belize \$ (Million)</u>			<u>US\$ (Million)</u>			% of Base Cost
	Local	Foreign	Total	Local	Foreign	Total	
Teacher Education	2.71	1.46	4.17	1.35	0.73	2.08	20
Education Development	6.23	6.75	12.98	3.12	3.37	6.49	61
Planning & Management	<u>2.04</u>	<u>1.93</u>	<u>3.97</u>	<u>1.02</u>	<u>0.97</u>	<u>1.99</u>	<u>19</u>
Base Costs	10.98	10.14	21.12	5.49	5.07	10.56	100
Contingencies	2.08	2.08	4.16	1.04	1.04	2.08	20
TOTAL PROJECT COSTS	<u>13.06</u>	<u>12.22</u>	<u>25.28</u>	<u>6.53</u>	<u>6.11</u>	<u>12.64</u>	<u>120</u>

Table 2: COSTS BY CATEGORIES OF EXPENDITURES

Category of Expenditure	Belize \$ (Million)			US\$ (Million)			% Base Costs
	Local	Foreign	Total	Local	Foreign	Total	
<u>Investment Costs</u>							
Civil Works	4.52	3.27	7.79	2.26	1.64	3.90	37
Professional Fees	0.56	0.12	0.68	0.28	0.06	0.34	3
Furniture	0.55	0.24	0.79	0.28	0.12	0.40	4
Equipment	0.16	1.47	1.63	0.08	0.73	0.81	8
Vehicles	0.04	0.40	0.44	0.02	0.20	0.22	2
Books	0.06	0.25	0.31	0.03	0.13	0.16	1
Foreign Consultants	0.70	1.62	2.32	0.35	0.81	1.16	12
Foreign Fellowships	0.09	0.83	0.92	0.05	0.41	0.46	4
Local Consultants	1.55	--	1.55	0.77	--	0.77	7
Local Fellowships	1.03	--	1.03	0.51	--	0.51	5
Textbooks	<u>0.37</u>	<u>1.50</u>	<u>1.87</u>	<u>0.19</u>	<u>0.75</u>	<u>0.94</u>	<u>9</u>
Subtotal	9.64	9.70	19.34	4.82	4.85	9.67	92
<u>Recurrent Costs</u>							
Pre-service Training Allowances	0.04	--	0.04	0.02	--	0.02	0
Salaries of Additional Staff	0.73	--	0.73	0.37	--	0.37	3
Consumable & Training Materials	0.08	0.32	0.40	0.04	0.16	0.20	2
Operation & Maintenance	<u>0.49</u>	<u>0.12</u>	<u>0.61</u>	<u>0.24</u>	<u>0.06</u>	<u>0.30</u>	<u>3</u>
Subtotal	1.34	0.44	1.78	0.67	0.22	0.89	8
Total Base Costs	10.98	<u>10.14</u>	<u>21.12</u>	<u>5.49</u>	<u>5.07</u>	<u>10.56</u>	<u>100</u>
<u>Contingencies</u>							
-Physical	0.89	0.85	1.74	0.44	0.43	0.87	8
-Price	<u>1.19</u>	<u>1.23</u>	<u>2.42</u>	<u>0.60</u>	<u>0.61</u>	<u>1.21</u>	<u>12</u>
Subtotal	2.08	2.08	4.16	1.04	1.04	2.08	20
TOTAL PROJECT COSTS	<u>13.06</u>	<u>12.22</u>	<u>26.28</u>	<u>6.53</u>	<u>6.11</u>	<u>12.64</u>	<u>120</u>

NOTES: Subtotal may not add to totals due to rounding. Costs include taxes and duties.

Table 3: COSTS BY SUB-COMPONENT

<u>Component / Sub-Component</u>	<u>Belize \$ (Million)</u>			<u>US\$ (Million)</u>			<u>% Base Costs</u>
	<u>Local</u>	<u>Foreign</u>	<u>Total</u>	<u>Local</u>	<u>Foreign</u>	<u>Total</u>	
<u>Teacher Education</u>							
Strengthening the Teacher Training System	0.94	1.42	2.36	0.47	0.71	1.18	11
Teacher Training & Upgrading	1.76	0.05	1.81	0.88	0.02	0.90	9
Subtotal	2.70	1.47	4.17	1.35	0.73	2.08	20
<u>Education Development</u>							
School Facilities Curric. & Textbook Development	4.65	3.68	8.33	2.32	1.84	4.16	39
Assessment & Evaluation	1.25	2.48	3.73	0.63	1.24	1.87	18
Assessment & Evaluation	0.34	0.58	0.92	0.17	0.29	0.46	3
Subtotal	6.24	6.74	12.98	3.12	3.37	6.49	60
<u>Planning & Management</u>							
Education Planning Unit	0.36	0.75	1.11	0.18	0.38	0.56	6
New Education Centers	0.86	0.79	1.65	0.43	0.39	0.82	8
PIU	0.82	0.39	1.21	0.41	0.20	0.61	6
Subtotal	2.04	1.93	3.97	1.02	0.97	1.99	20
Total Base Costs	<u>10.98</u>	<u>10.14</u>	<u>21.12</u>	<u>5.49</u>	<u>5.07</u>	<u>10.56</u>	<u>100</u>
<u>Contingencies</u>							
-Physical	0.89	0.85	1.74	0.44	0.43	0.87	8
-Price	<u>1.19</u>	<u>1.23</u>	<u>2.42</u>	<u>0.60</u>	<u>0.61</u>	<u>1.21</u>	<u>12</u>
	2.08	2.08	4.16	1.04	1.04	2.08	20
TOTAL PROJECT COSTS	<u>13.06</u>	<u>12.22</u>	<u>25.28</u>	<u>6.53</u>	<u>6.11</u>	<u>12.64</u>	<u>120</u>

3.3 Customs Duties and Taxes. All imported goods destined for education are exempt from customs duties and taxes. The estimated cost of the project includes indirect hidden import duties and taxes estimated at about US\$0.12 million.

3.4 Contingency Allowances. Estimated project costs include physical contingencies (US\$0.87 million) estimated at 10 percent of all physical components, except for vehicles, and at 5 percent for increased requirements of technical assistance, salaries and allowances. The estimated costs of the project also include price contingencies (US\$1.21 million) to cover expected price escalation at the following rates: for civil works and goods, foreign costs: 3.4 percent in FY92 through FY98; local costs: 1.1 percent in FY92, 0.01 percent in FY93, 1.6 percent in FY94, 3.8 percent in FY95 and 3.7 percent thereafter; for salaries, fees and operation and maintenance, foreign costs: 3.4 percent for FY92 through FY98; local costs: 3.4 percent in FY92, 3.6 percent in FY93, 3.9 percent in FY93-94, and 4.1 percent thereafter.

3.5 Foreign Exchange Component. The estimated foreign exchange component of US\$6.11 million is calculated on the basis of estimated foreign exchange proportions as follows: civil works, 42 percent; professional fees, 18 percent; furniture, 30 percent; equipment and vehicles, 90 percent; books and consumable materials, 80 percent; international fellowships and foreign consultants, 90 percent and 70 percent respectively.

3.6 Financing Plan. The proposed Bank loan of US\$7.1 million equivalent would finance about 56 percent of the total cost of the project net of taxes and 84 percent of the total estimated foreign exchange component. The balance would be provided by the ODA of the United Kingdom in the form of a grant for approximately US\$1.3 million equivalent. The GOB would finance the remaining net costs of US\$4.1 million and all taxes. The ODA grant would be made directly to Belize and finance foreign technical assistance, books, travel and study costs. A condition of loan effectiveness would be that the Government would sign an agreement with ODA, satisfactory to the Bank, on the co-financing of the proposed project (para. 5.3 (a)).

3.7 Incremental Recurrent Costs. Incremental costs attributable to the project would total approximately US\$0.9 million over seven years through 1998. A portion of this amount for operations and maintenance of school facilities would fall under the Government's Capital Budget II allocation for education, sports and culture. The remainder would need to be covered under the annual recurrent budget for education. At negotiations, the Government agreed to provide annual increments to the recurrent budget for staff salaries, operations and maintenance, and other expenses during 1992-98 at levels necessary to support project implementation and sustain all project inputs after project completion (para. 5.2 (c)).

B. Procurement

3.8 The procurement arrangements for the project are summarized in Table 4. Contracts for works (instructional facilities and maintenance, estimated total value US\$2.8 million), exceeding US\$100,000 equivalent, which

represent about 61 percent of the total cost of civil works (US\$5.04 million) would be awarded on the basis of local competitive bidding procedures (LCB) acceptable to the Bank and open to the participation of foreign bidders. Because of the phasing of construction (Annex 10: Implementation Schedules) and the small value of these contracts (maximum value of US\$0.3 million equivalent), no foreign firm is expected to participate. Contracts for rehabilitation/renovation and minor extensions below US\$50,000 each in value and US\$2.2 million in the aggregate would be awarded to local contractors and individual craftsmen based on evaluating at least three price quotations. In the event three quotations cannot be obtained, direct negotiations will be permitted provided that the Bank is first informed of the lack of responsiveness to the shopping procedure.

3.9 Contracts for Equipment and Vehicles (US\$1.23 million). Contracts for equipment and vehicles (US\$0.92 million) representing 75 percent of total equipment costs would be bulked in packages estimated to cost the equivalent of US\$100,000 or more each and would be awarded on the basis of ICB. Contracts for the purchase of equipment below US\$100,000 equivalent each, not exceeding US\$0.21 million in the aggregate, would be awarded on the basis of LCB procedures acceptable to the Bank. Contracts for the purchase of equipment below US\$25,000 equivalent or about 8 percent of the equipment may be awarded on the basis of shopping, with solicitation of price quotations from at least three suppliers up to a maximum of US\$0.1 million. For equipment procured under ICB, a 15 percent domestic preference or the prevailing import duties, whichever is lower, may be accorded for locally manufactured equipment.

3.10 Contracts for Furniture (US\$0.47 million) would be spread across a variety of users over the life of the project. They would not be appropriate for ICB, and therefore would be processed through LCB procedures which are acceptable to the Bank. Locally manufactured furniture is available at very economical prices; foreign firms are unlikely to bid. Imported furniture locally available in the market which is procured for educational institutions would be exempt from customs duties and taxes. Contracts for the purchase of furniture estimated to cost less than US\$25,000 equivalent up to an aggregate of US\$0.15 million may be awarded on the basis of local shopping with solicitation of price quotations from at least three suppliers. The majority of furniture, about 68 percent, will be procured through local competitive bidding.

3.11 Textbooks, Training Materials, and Consumables (valued at US\$1.60 million). Textbooks (US\$1.35 million) would be procured by direct purchasing from publishers, both local and international. The selection of textbooks would be made by each school from a list provided by MOE; training materials and consumables (US\$0.25 million) would be purchased through shopping procedures acceptable to the Bank.

3.12 Technical Assistance and Training (valued at US\$3.41 million). The majority of technical assistance and training is cofinanced in parallel by the ODA and will be provided under contract by an educational institution in the United Kingdom. The institution will be selected by ODA and procurement

carried out in accordance with ODA regulations. Bank-financed inputs will be procured in accordance with World Bank consulting guidelines.

3.13 Prior Review. All procurement documentation under ICB and civil works under LCB valued at above US\$100,000 each would be subject to prior review and approval of the Bank as well as the first two contracts for goods and works procured through LCB valued at below \$100,000 and through shopping respectively.

Table 4: PROCUREMENT METHOD
(US\$ Million)

<u>Project Element</u>	<u>Procurement Method</u>			<u>N.B.F</u>	<u>Total Cost</u>
	<u>ICB</u>	<u>LCB</u>	<u>Other</u>		
1. Works					
1.1 Instructional Facilities	-	2.80 (1.68)	1.86 (1.12)	-	4.66 (2.80)
1.2 Maintenance	-	-	0.38 (0.23)	-	0.38 (0.23)
2. Goods					
2.1 Equipment & Vehicles	0.92 (0.55)	0.21 (0.13)	0.10 (0.06)	-	1.23 (0.74)
2.2 Furniture	-	0.32 (0.19)	0.15 (0.09)	-	0.47 (0.28)
2.3 Textbooks, Training Material, Consumable	-	-	1.60 (1.03)	-	1.60 (1.03)
3. Service Contracts					
3.1 Architectural Fees	-	-	0.42 (0.25)	-	0.42 (0.25)
4. Consultancies					
4.1 Technical Assistance	-	-	0.58 <u>b/</u> (0.58)	1.27 <u>a/</u>	1.85 (0.58)
4.2 Training	-	-	1.56 (0.94)	-	1.56 (0.94)
5. Miscellaneous					
5.1 Incremental Salaries	-	-	0.47 <u>c/</u> (0.28)	-	0.47 (0.28)
TOTAL	<u>0.92</u> (0.55)	<u>3.33</u> (2.00)	<u>7.12</u> (4.58)	<u>1.27</u>	<u>12.64</u> (7.13)

Note: Figures in parentheses are the respective amounts financed by the Bank loan. N.B.F: Not Bank-financed.

a/ Cofinanced in parallel by the Overseas Development Administration (ODA); procurement in accordance with ODA regulations in conformity with para. 1.4 of World Bank Guidelines; Procurement under IBRD Loans and IDA Credits (Washington, D.C. May 1985).

b/ Services should be procured in accordance with World Bank Guidelines: Use of Consultants by World Bank Borrowers and by the World Bank as executing agency (Washington, D.C., August 1981).

c/ Not subject to procurement.

C. Disbursements

3.14 Disbursement Percentages. The Bank loan would be disbursed against: 100 percent of foreign and local expenditures for goods; 60 percent of expenditures for civil works and professional fees; 100 percent of foreign expenditures and 60 percent of local expenditures for consultants, training fellowships and study trips. Recurrent costs for consumables, training materials and allowances, salaries of additional staff, and operation and maintenance would be financed on a declining basis yearly starting in 1992 at 100 percent up to an aggregate of US\$100,000; thereafter 85 percent up to a total disbursement aggregate of US\$202,000; thereafter 75 percent up to a total disbursement aggregate of US\$314,000; thereafter 60 percent up to a total disbursement aggregate of US\$416,000; thereafter 50 percent up to a total disbursement aggregate of US\$506,000; thereafter 35 percent up to a total aggregate of US\$560,000; and 25 percent thereafter.

3.15 Required Documentation. Except for contracts requiring prior review, disbursements for civil works contracts estimated to cost less than US\$100,000 equivalent, and contracts for goods, consumable materials, services and training estimated to cost less than US\$50,000 equivalent would be made against Statements of Expenditures (SOE) certified by MOE and representatives authorized by the borrower. Documentation would be retained by MOE and made available for review by the Bank during the course of supervision missions. All other disbursements would be made against fully documented withdrawal applications.

3.16 Special Account. In order to accelerate disbursement with respect to the Bank's share of expenditures pre-financed by the Government, and in order to allow for direct payment of other eligible local and foreign expenditures, a Special Account would be opened in the Central Bank of Belize with an initial deposit of US\$0.5 million equivalent to cover four months of expected requirements of Bank-financed items.

3.17 Retroactive Financing. Up to US\$0.7 million is recommended to cover eligible expenditures after April 1, 1991 for costs incurred in preparing and implementing appraised project activities.

3.18 Disbursement Profile. The proposed loan would be disbursed over a seven-year period. This is realistic given the design and the advanced state of preparation of the project. The pre-appraisal mission carefully evaluated MOE's capability and capacity to effectively implement the project in a timely manner. Specific emphasis and analysis were devoted to insuring the implementation of civil works and the procurement of furniture and equipment. The project is expected to be completed by December 31, 1998, and the Closing Date would be June 30, 1999. The standard disbursement profile for education projects is seven and one half years. The design of the project, the current advanced state of preparation, and the measures which would be taken to expedite procurement and disbursement reinforce the justification for a seven-year disbursement period. A forecast of annual expenditures and disbursement is shown in Annex 12.

D. Project Management and Implementation

3.19 Status of Preparation

- (a) Sites. Sites for all three new Education Centers have been identified and selected, and are in the process of being acquired. No problems are anticipated in the acquisition of sites since most sites are on government land. All sites for the schools listed in Annex VI are existing sites. The extension work and the new construction pertaining to the CDU and the Teacher Training College will take place at the existing sites.
- (b) Designs and Bidding Documents. Local architectural firms have been engaged to prepare and develop designs and establish standard bidding documents for the procurement of civil works. A technical survey for school renovations and preliminary designs for new construction scheduled for 1992 will be completed by the end of 1991. As a condition of effectiveness, the Government would submit preliminary designs and draft bid documents for new facilities satisfactory to the Bank (para. 5.3 (b)).
- (c) Preparation of Lists for Goods. Preliminary lists of furniture, equipment, vehicles and books were prepared and reviewed by the pre-appraisal mission team.
- (d) Technical Assistance, Training and Studies. The technical assistance and training requirements of the project have been identified and are listed in Annex 9. Terms of reference for long-term specialists were drafted during appraisal. The overall package of technical assistance, training and study tours would be contracted by ODA to a School of Education or a comparable institution in the United Kingdom. The institution would be required to demonstrate a capacity to offer an integrated approach to teaching, learning and assessment, high-level expertise for the specified long-term posts, and wide ranging experience in international project development and management. The institution would also arrange and supervise overseas visits of Belizeans, ensuring that their study programs were relevant and properly managed. This arrangement would be expected to begin in January 1992.

3.20 Project Management. The proposed project would be managed by a small Project Implementation Unit (PIU) staffed by Belizeans and located in MOE under the direct supervision of the CEO. The PIU would be comprised of: a Director (education administrator), Civil Works Supervisor, Financial and Administrative Officer, and secretarial and administrative support services. The PIU's main functions would be to: (a) liaise with the Bank, the Ministry of Finance and MOE; (b) assess and optimize the use of resource inputs which are provided; (c) monitor and review project progress and report it at frequent intervals and formulate implementation schedules on the basis of progress, problems and issues faced by the project; (d) arrange for consultant

services for the project; and (e) identify places/institutions for fellowship training, select staff to receive fellowships and arrange for fellowships and training programs.

3.21 The Director would manage the PIU team and coordinate the inputs of the three long-term foreign consultants attached to the BTTC, CDU and the Planning Unit, and those of the short-term consultants. The Director and the CEO would be responsible for ensuring that the PIU and MOE staff in Belize City, Belmopan, and the districts maintain close communication and cooperation, and work together effectively on project tasks, both in planning and implementation. The PIU would also be expected to maintain similar working relationships with the managers of the denominational schools in implementing the project. Financing for the PIU professional staff, secretaries, and logistical support are included under the project's planning and management component. All PIU staff positions would be filled for the duration of the project. The project budget also allocates reimbursement for regular MOE staff involved with the project for those extra hours worked on priority project activities. Compensation would be in accordance with criteria approved by the Bank at negotiations, and not exceed a total of US\$435,000 during the project. The main criteria to be used in compensation would be that: (a) work is performed outside normal working hours, and (b) it is performed outside the individuals' official job description. Prior to negotiations, the Government established the PIU and appointed a Director with qualifications and experience satisfactory to the Bank, and agreed not to change the Director without the prior agreement of the Bank (para. 5.1 (b)); as a condition of loan effectiveness, the Government would complete the appointments of the PIU professional staff with satisfactory skills and experience (para. 5.3 (c)).

3.22 Implementation Processes. The PIU would manage project-related procurement. However, all ICB and LCB tendering would be done through the procurement office in the Ministry of Finance. Belize's existing procedures for procuring civil works and other inputs are satisfactory and would be used under the project. School construction, repair, and related supervision by architectural/consulting firms would be contracted by the PIU. A key feature of the implementation strategy would be to ensure the full cooperation and participation of all the actors in the education sector in Belize, especially church managements, in the planning and implementation of the project. The PIU would be expected to act directly and through the CEO to foster this cooperation and participation. The project would be completed within a seven-year period beginning in 1992 and ending in late 1998. Schedules of Implementation are in Annex 10. Prior to negotiations, the Government confirmed that it had filled 50 percent of existing and newly created establishment posts of importance to project implementation in the BTTC, PU, Examinations Unit, and District Education Offices; and the remaining posts will be filled by June 30, 1992 (para. 5.1 (c)).

3.23 Monitoring and Review. Monitoring indicators for each component have been developed to track project implementation in relation to key performance targets and objectives. These targets are an integral part of the project action plan prepared for the project. The project action plan will be updated annually by the PIU and submitted for Bank review and comment. At

negotiations, the Government agreed to the monitoring indicators and key performance targets in Annex 11 (para. 5.2 (d)).

3.24 The action plan and the monitoring indicators of project implementation performance would form the central focus in annual reviews of project implementation. The reviews would assess previous year's progress towards achieving project expenditure targets, and management and performance targets, and would establish targets and schedules for the following year. The reviews would also focus on resolving implementation problems and making needed adjustments in project design. The reviews would be conducted jointly by MOE and the Bank. MOE would present the findings and recommendations of the reviews to the NCE for discussion. During negotiations, the Government agreed to prepare and furnish for Bank review, not later than December 1 of each year beginning in 1992: (a) an evaluation of project implementation results and expenditures for the preceding year; (b) a related review of achievements and shortfalls based on established plans and objectives; (c) an updated implementation schedule and expenditure plan for the following year, using criteria acceptable to the Bank; and (d) the results of periodic assessments carried out by MOE to measure student achievement at the primary level (para. 5.2 (e)).

3.25 A mid-term review of the project would be conducted towards the end of 1994 to assess, inter alia: implementation of the agreed plan for changes in the system of teacher training, certification and remuneration, adequacy of the level and composition of education expenditures, including non-personnel expenditures as a share of total expenditures; implementation of the maintenance plan for school facilities; and implementation of the textbook loan scheme and its financial provisions, and take corrective actions as needed.

E. Accounting and Auditing

3.26 Before disbursements begin, the PIU would establish a chart of accounts and develop an administrative manual for the financial operation of the project. The accounting system would allow for reconciliation of the project accounts with the general budgetary accounting system of MOE. The annual audit reports would include a State of Source and Application of Funds, a separate opinion on SOEs, a separate audit report on the revolving fund for the project, and an opinion on compliance. An opinion on compliance with procurement arrangements specified in loan documents, and on the appropriateness of procurement documentation, should be included in the audit of SOEs. The audit will be performed by a private firm of independent auditors acceptable to the Bank and under terms of reference approved by the Bank. It will be sent to the Bank no later than four months after the end of each fiscal year.

IV. BENEFITS AND RISKS

4.1 Project Benefits. The project would improve the quality and effectiveness of primary education by: (a) increasing the percentage of certified primary school teachers from 45 percent to 80 percent; (b)

renovating and building approximately 105 primary school classrooms to relieve overcrowding and improve the teaching and learning environment; (c) providing all primary school children with a basic set of textbooks in the classroom; (d) revising and standardizing primary school curricula and constructing diagnostic and achievement tests for continuous classroom evaluation and feedback for policy, teacher training and curriculum development; and (e) strengthening the planning and management capacity of the MOE to make needed improvements in management information, research and analysis, and education and training of staff.

4.2 Project Risks. There are two main risks. The first relates to the limited management capacity in MOE to implement the measures needed to improve the quality and efficiency of the education system. This risk is addressed by providing support for a Project Implementation Unit under the CEO to plan and coordinate project implementation with MOE staff and by making available technical assistance and training to strengthen the management of government and church schools. The second risk is that project achievements would not be sustained after project completion. To ensure the sustainability of project achievements, MOE would approve the necessary policies and levels of recurrent budgetary support for key programs of teacher training, textbook distribution, and school facilities construction and maintenance.

V. AGREEMENTS REACHED AND RECOMMENDATION

5.1 Prior to negotiations, the Government confirmed it had:

- (a) approved the proposed changes to the system of teacher training, certification, and remuneration developed for the proposed project (para. 2.6);
- (b) established the PIU and appointed its Director with qualifications and experience satisfactory to the Bank, and agreed not to change the Director without the prior agreement of the Bank (para. 3.21); and
- (c) filled 50 percent of existing and newly created establishment posts of importance to project implementation in the BTTC, PU, Examinations Unit, and District Education Offices; and the remaining posts will be filled by June 30, 1992 (para. 3.22).

5.2 At negotiations, the Government agreed to:

- (a) sustain a minimum annual allocation of US\$300,000 equivalent in real terms in each fiscal year for operations and maintenance of school facilities beginning on April 1, 1993, and continuing throughout project implementation, and to prepare and implement an annual operations and maintenance plan for all primary schools, acceptable to the Bank, by December 31, 1992 (para. 2.9);

- (b) adopt a policy by May 31, 1992 for permitting each school to use textbook loan fees collected from parents to purchase additional textbooks or other instructional materials (para. 2.13);
- (c) provide annual increments to the recurrent budget for staff salaries, operations and maintenance, and other expenses during 1992-98 at levels necessary to support project implementation and sustain all project inputs after project completion (para. 3.7);
- (d) the monitoring indicators and key performance targets in Annex 11 (para. 3.23);
- (e) prepare and furnish for Bank review, not later than December 1 of each year beginning in 1992: (i) an evaluation of project implementation results and expenditures for the preceding year; (ii) a related review of achievements and shortfalls based on established plans and objectives; (iii) an updated implementation schedule and expenditure plan for the following year, using criteria acceptable to the Bank; and (iv) the results of periodic assessments carried out by MOE to measure student achievement at the primary level (para. 3.24); and
- (f) conduct a mid-term review of the project towards the end of 1994 and take corrective actions as needed.

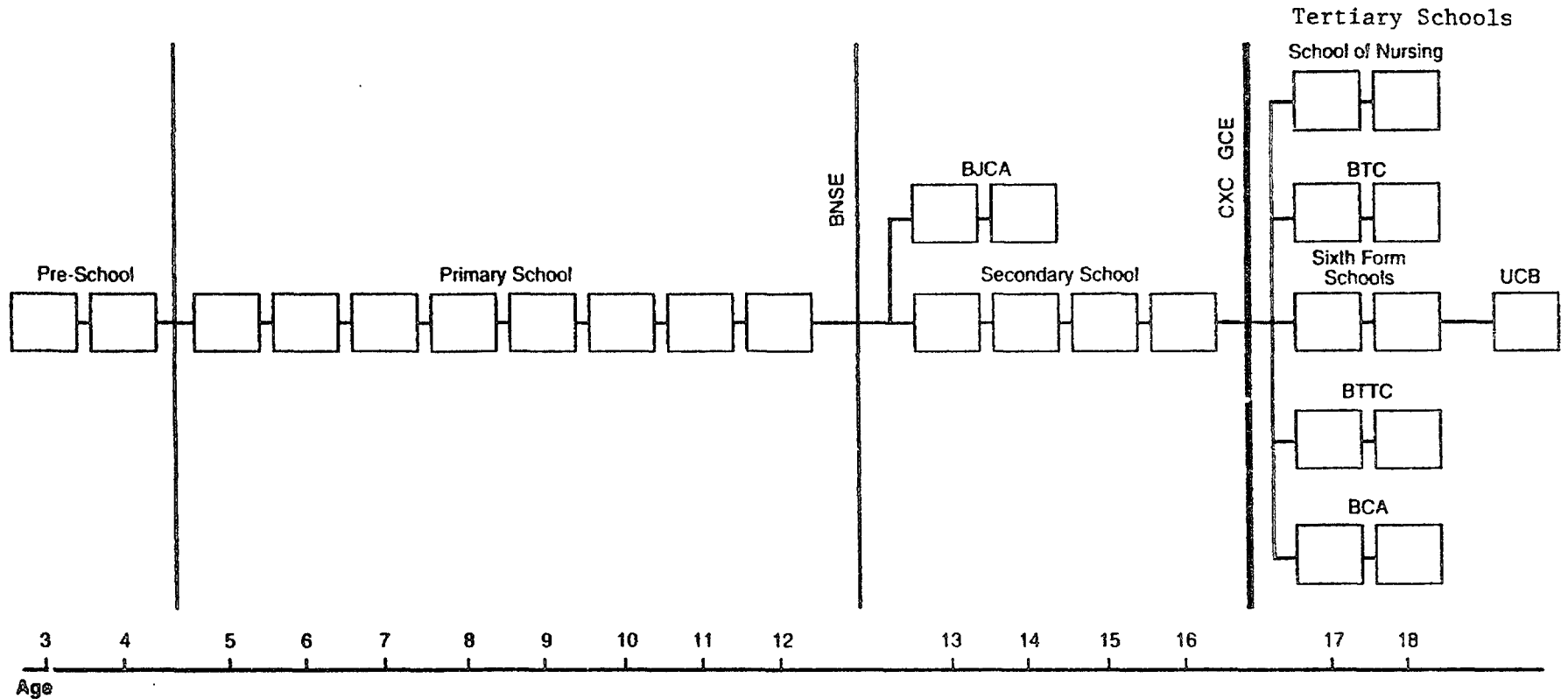
5.3 As conditions of loan effectiveness, the Government would:

- (a) sign an agreement with ODA, satisfactory to the Bank, on the co-financing of the proposed project (para. 3.6);
- (b) submit preliminary designs and draft bidding documents for new facilities satisfactory to the Bank (para. 3.19 (b)); and
- (c) complete the appointment of the PIU professional staff with satisfactory skills and experience (para. 3.21).

Recommendation

5.4 Subject to the above conditions, the proposed project would constitute a suitable basis for a Bank loan of US\$7.1 million equivalent to the Government of Belize, repayable in 17 years, including a four-year grace period, at the Bank's standard variable interest rate.

THE EDUCATION SYSTEM OF BELIZE 1991



BCA: Belize College of Agriculture
 BJCA: Belize Junior College of Agriculture
 BNSE: Belize National Selection Examination
 BTC: Belize Technical College

BTTC: Belize Teachers College
 CXC: Caribbean Examination Council
 GCE: General Certificate of Education
 UCB: University College of Belize

BELIZE

PRIMARY EDUCATION DEVELOPMENT PROJECT

PRIMARY EDUCATION STATISTICS

Table 1: Primary Education Enrollment
(1975/6-1990/1)

School Year	Pre-School/ Beginner	Infant I	Infant II	Standard I	Standard II	Standard III	Standard IV	Standard V	Standard VI	Totals
74-5		6,150	4,311	4,221	4,160	3,624	3,458	3,023	2,791	31,738
75-6		6,281	4,320	4,311	4,115	3,982	3,525	2,986	3,047	32,567
76-7		6,602	4,384	4,330	4,062	3,871	3,775	2,064	3,017	32,105
77-8/a		6,701	4,450	4,395	4,123	3,929	3,832	2,095	3,062	32,587
78-9		6,590	4,784	4,422	4,240	4,186	3,819	3,372	3,509	34,922
79-80		6,609	4,655	4,537	4,410	3,942	3,779	3,297	3,386	34,615
80-1/b		6,147	4,958	4,409	4,635	4,036	3,923	3,173	3,323	34,604
81-2		6,477	4,697	4,710	4,444	4,322	3,896	3,285	3,250	35,081
82-3		6,560	4,848	4,774	4,677	4,193	4,068	3,391	3,469	35,980
83-4		6,991	5,125	4,875	4,832	4,599	4,230	3,628	3,473	37,753
84-5		7,158	5,168	4,992	4,764	4,588	4,324	3,809	3,709	38,512
85-6		7,357	5,155	5,218	4,831	4,493	4,364	3,996	3,798	39,212
86-7		7,449	5,376	5,049	4,841	4,667	4,409	4,074	3,914	39,779
87-8/c		7,835	5,643	5,375	5,088	4,859	4,570	4,206	4,010	41,586
88-9/c		8,035	5,775	5,579	5,214	4,933	4,619	4,234	4,005	42,394
89-90/c		8,427	6,045	5,920	5,466	5,122	4,774	4,358	4,089	44,201
90-1/d	1,378	7,449	6,319	6,271	5,721	5,311	4,928	4,479	4,167	46,023

a/ Mission estimate - data not collected in 1977-78

b/ Infant I enrollments sometimes include children in pre-schools, sometimes not; it appears that they are not included in 1980-81.

c/ Estimates based on the total number of primary school children recorded on schools' administrative monthly returns - and the proportion of the total in each grade recorded in 1986-87 end in 1990-91.

d/ MOE Planning Unit's SFIP exercise. Only pre-school units attached to primary schools have been included. Pupils in such units and 'beginners' in school proper are shown separately.

Source: CSO except where otherwise indicated; mission estimates; Planning Unit.

BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT

PRIMARY EDUCATION STATISTICS

Table 2: Number of Government and Government-Aided
Primary Schools by District by Urban/Rural
(1990-91)

	DISTRICT:						<u>All</u>
	<u>Belize</u>	<u>Cayo</u>	<u>Orange Walk</u>	<u>Corozal</u>	<u>Stann Creek</u>	<u>Toledo</u>	
Urban	36	12	9	7	7	3	74
Rural total	25	29	22	27	22	37	162
of which:							
No allowance	9	16	14	22	12	9	82
III (least remote)	7	2	0	0	5	0	14
II	8	2	4	4	3	8	29
I (most remote)	1	9	4	1	2	20	37
All	61	41	31	34	29	40	236

Source: MOE Planning Unit (SFIP exercise, spring term 1991)

BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT
PRIMARY EDUCATION STATISTICS

Table 3: Primary Education Enrollment by District by Management
(1990-91)

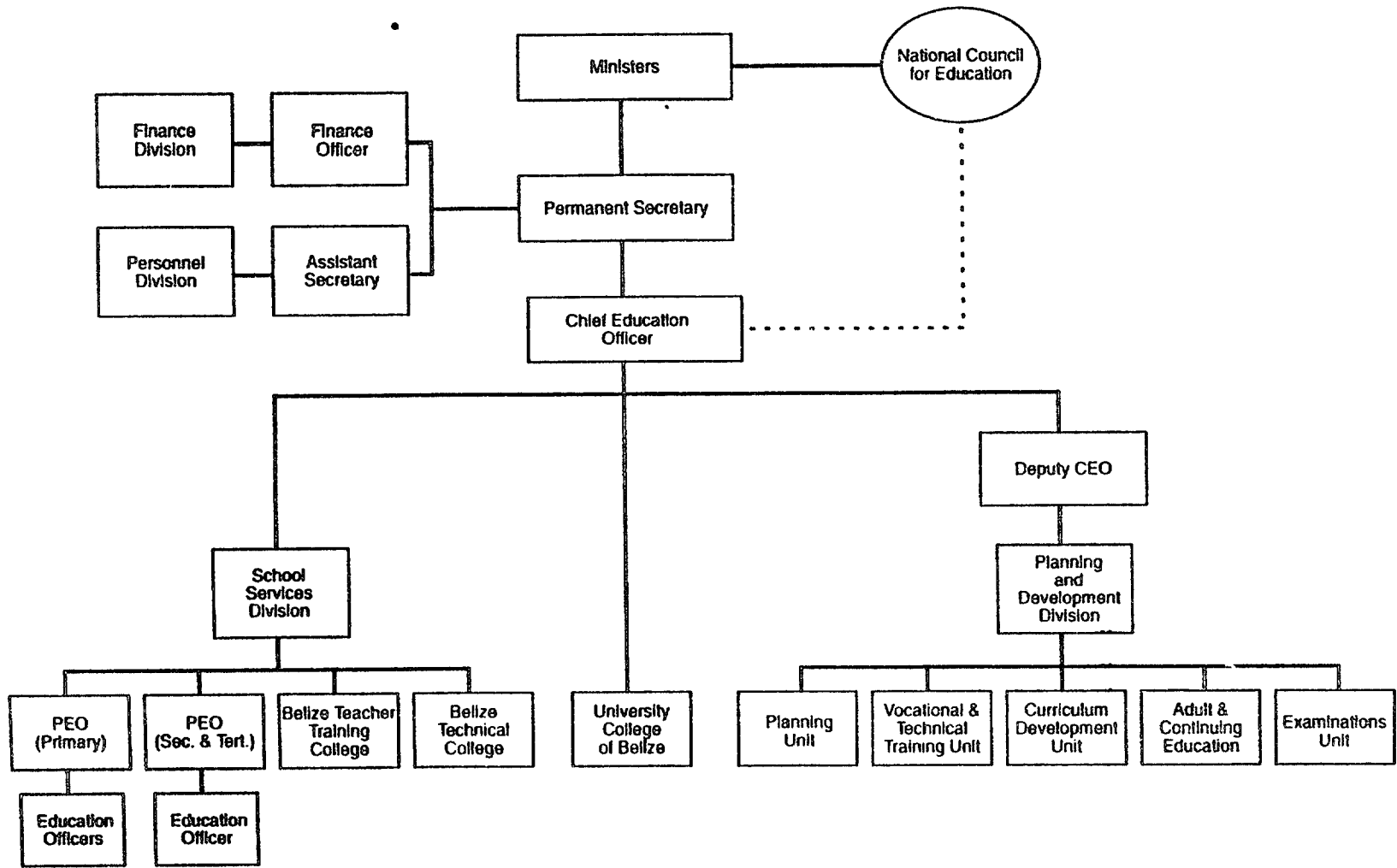
MANAGEMENT	DISTRICT						All	% of all
	Belize	Cayo	Orange Walk	Corozal	Stann Creek	Toledo		
Government	725	1,660	1,705	767	0	201	5,058	11
Roman Catholic	5,676	6,469	4,745	4,307	3,460	4,003	28,660	62.3
Anglican	2,722	533	251	300	633	58	4,497	9.8
Methodist	2,288	0	0	516	495	340	3,639	7.9
Seventh Day Adventist	211	162	146	229	85	0	833	1.8
Nazarene	0	402	0	287	0	0	689	1.5
Assemblies of God	236	0	0	120	136	0	492	1.1
Other	1,620	158	308	0	69	0	2,115	4.7
All	13,478	9,384	7,155	6,526	4,878	4,602	46,023	100
% of All	29.3	20.4	15.5	14.2	10.6	10.0	100	

BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT
PRIMARY EDUCATION STATISTICS

Table 4: Number of Primary Schools by District by Management
(1990-91)

MANAGEMENT	DISTRICT						All
	Belize	Cayo	Orange Walk	Corozal	Stann Creek	Toledo	
Government	5	8	9	6	-	4	32
Roman Catholic	20	26	17	20	16	31	130
Anglican	13	3	1	1	4	2	24
Methodist	12	-	-	2	5	3	22
Seventh Day Adventist	2	1	2	2	1	-	8
Nazarene	0	2	0	2	0	0	4
Assemblies of God	1	0	0	1	2	0	4
Other	8	1	2	0	-	-	12
All	61	41	31	34	29	40	236

BELIZE MINISTRY OF EDUCATION Organizational Chart



CEO: Chief Education Officer
 PEO: Primary Education Officer
 Source: MOE

BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT

Ministry of Education's Expenditure by Sub-sector
(*000 BZ\$)

CATEGORY	Budget Estimate		Estimated Exp.		Accrual Expenditures		Actual	
	1991/92	%	1990/91	%	1989/90	%	1988/89	%
1. Central Administration	741	2.0	678	2.0	542	1.8	712	3.0
2. <u>Primary Education</u> including:	23,748	62.5	21,724	62.8	19,069	62.7	13,955	59.2
- Govt. schools	2,525	6.6	2,211	6.4	2,048	6.7	n/a	n/a
- Grant-aided denominated schools	20,959	55.2	19,282	55.8	16,800	55.3	12,481	52.9
- Other	264	.7	231	.6	221	.7	n/a	n/a
3. <u>Secondary Education</u> including:	7,809	20.6	7,250	20.9	6,362	20.9	5,679	24.1
- Govt. schools	2,874	7.6	2,550	7.3	2,238	7.4	n/a	n/a
- Grant-aided denominated schools	4,935	13.0	4,700	13.6	4,124	13.5	3,029	12.8
4. Higher	3,092	8.1	2,916	8.4	2,668	8.8	1,557	6.6
5. Other	2,581	6.8	2,042	5.9	1,754	5.8	1,666	7.1
TOTAL	37,971	100.00	34,610	100.00	30,395	100.00	23,579	100.00

BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT

PUBLIC EXPENDITURE PER STUDENT BY LEVEL OF EDUCATION
1989/90 (BZ\$)

<u>Category</u>	<u>Expenditure</u> (BZ\$)	<u>Enrollment</u>	<u>Public Expenditure</u> <u>per Student</u> (BZ\$)
Primary	19,069	42,183	452
Secondary	6,362	7,606	836
Higher	2,668	1,318	2,024

Source: Ministry of Education and mission estimates

BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT

TEACHER EDUCATION COMPONENT

I. Current System and Background to the Project

Current System

1. Several institutions participate in the teacher training system. Belize Teachers College (BTTC) is responsible for training primary school teachers and recently has also become responsible for the in-service training of teachers and principals. The University College of Belize (UCB) undertakes the training of secondary school teachers. The Curriculum Development Unit (CDU) runs in-service programs related to curriculum development reform and adoption processes, and the Belize Teachers Union (BTU) runs informal programs.

2. The major teacher training route is currently based upon a system of acquiring academic qualifications through self-study, derived from the Pupil Teacher System where a school leaver enters teaching and is trained on the job. Successful completion of this course of study renders a teacher eligible to take the entrance examination to the BTTC for a three year full-time course of study for the Joint Board of Teacher Education Course (JBTE) offered by the University of the West Indies (UWI): the third year consists of an internship, or supervised practice teaching. A one year pre-service course was introduced in 1990-91 in anticipation of the restructuring of the system under the project.

3. Belize has not traditionally had a system of pre-service teacher training. Therefore teachers recruited by church managements and the Government, depending on the management of the school, have had no training. In many cases in the past they have been early leavers from the secondary system or even primary school leavers. They then started upon a long period of self study for which syllabi and learning materials were often absent. There are five categories of untrained teachers:

- (a) Primary Certificate Teacher, who has completed Standard 6;
- (b) First Teacher, who is a primary school leaver who has passed an examination which is roughly equivalent to the first year of high school: this is an Uncertified Teacher (all the below are Certified);
- (c) Second Class Teacher, a First Teacher or secondary school leaver after second grade or higher (but not completed) or graduate from Belize Junior Secondary School (BJSS) who has passed an examination through self-study qualifying them at a level roughly equivalent to the second year of High School;

- (d) High School Graduate, who has successfully completed secondary school; and
- (e) First Class Teacher, who prepares through self-study and then passes an examination which qualifies a teacher at a level equivalent to the high school leaving standard. As there is no national secondary school leaving examination, the standard of different schools varies considerably. The assessment for First Class Teacher covers high school subjects, and has a small professional component (papers on methods and management, child psychology, one child observation, lesson plans, and one demonstrated lesson in front of the examiner). High school graduates must take the professional component only when their school transcripts and CXC results show inadequate achievement in the academic subjects: otherwise they also must take any subjects required.

4. Table 1 shows the 1990 composition of the teaching force by qualification.

Table 1: Number of Teachers by Qualification - 1990

Primary Cert./ First Teacher	Second Class	High School Graduate	First Class	Trained	TOTAL
105	78	457	426	875	1941

Source: Ministry of Education

Planning and Management of Teacher Training

5. The major responsibility for planning and managing the teacher-training system rests with the BTTC, in consultation with the other institutions mentioned. Cooperation between the formal institutions is not generally formalized although there is some interaction between CDU and BTTC for both planning and delivery of teacher orientation programs related to curriculum development. No clear institutional role definition is made for either BTTC or CDU with respect to in-service delivery.

Institutional Profiles

6. BTTC is managed by a Principal who reports to the Board of the College under a Chairman. Its members include the Chief Education Officer, church managers, principals, a teachers union representative and a BTTC staff representative.

7. Belize Teachers College has 22 full-time staff members and employs additional part-time staff. In 1990-91, total enrollment was 254, making an average of one staff person per twelve students. Taking into account vacancies and overseas study staff: student ratios are 1:16. Nineteen of the

staff have or are studying for a first degree; 12 have or are studying for a higher degree.

8. The Curriculum Development Unit (CDU) currently has 7 full-time staff. Three are full established posts, the remainder are filled by teachers on secondment from primary and secondary schools. CDU can also draw on part-time assistance from BTTC, UCB and schools for the running of orientation workshops for teachers.

Outreach Capacity

9. BTTC's outreach capacity consists of 6 field supervisors who are responsible for the monitoring and evaluation of trainees during internship. Presently two of these posts are vacant, but they will be filled in 1991. BTTC has no physical outreach capacity, relying on the use of District Education offices, District Resource Centers, and schools for the delivery of in-service teacher training.

10. The CDU has no staff with major responsibility for outreach delivery of curriculum orientation workshops; ad hoc teams are mobilized as required. The CDU has responsibility for managing and supporting the Teacher Resource Centers.

Teacher Supply and Posting

11. MOE has not, in the past, planned for teacher supply. Information for such planning has not always been available, and there has been no interaction between ministry planning officials and teacher training institutions.

12. Teachers are recruited by the MOE and church managements as the need arises. A formula for placing teachers, known as the Staffing Schedule, is used to allocate teacher entitlements to schools in accordance with enrollments. Entitlements are divided between certified and uncertified teachers. Thus, for example, a school with biennial average attendance of between 151 and 175 students would be entitled to 4 certified and 3 uncertified teachers. In general, the formula results in theoretical pupil-teacher ratios of between 20 and 25.

Salary and Incentives

13. The teacher salary scales are part of the overall civil service structure. For example, a trained teacher with a JBTE qualification enters the service on Scale 8, which currently has twenty increments from BZ\$9,120 to 17,328 p.a. First Class teachers are placed on Pay Scale 6 and High School graduates on Pay Scale 5. Teachers then move up two or three scales after receiving the JBTE certificate.

14. The career path and opportunities within BTTC are limited. The Principal is on Pay Scale 25 (BZ\$25,608 - 42,024 p.a.), one Vice Principal on Pay Scale 24 (BZ\$22,584 - 39,000), five Heads of Department posts on Pay Scale 21 (BZ\$20,484 - 36,900) and Lecturers on Pay Scale 14 (BZ\$14,700 -26,100).

The latter posts are within the same Pay Scale as a graduate teacher in primary and secondary schools and below that of a primary school principal with a degree.

15. Teachers in rural and remote areas receive travel and accommodation allowances. Teachers undergoing/in training receive full salary. Teacher trainees who are not yet salaried teachers, as on the new pre-service course, receive a grant of BZ\$350 per month, or, if they are from Belize City, BZ\$220 per month. All trainees receive a book allowance of BZ\$100 per year.

II. Proposed Changes to the Teacher Training System

A. Issues and Problems

16. At the institutional level, planning, management and delivery of programs is fragmented. Joint planning of work programs between BTTC and CDU is ad hoc in nature. There is no formalized mechanism between BTTC, ministry planning functions and school managers for the planning and projection of teacher supply.

17. Within BTTC the narrow promotion structure provides little incentive for staff. In addition, the management and organization of BTTC lacks clear functional definition and the Vice-Principal post is relegated to a largely administrative rather than professional/pedagogical function.

18. The BTTC institutional profile is reflected in the academic orientation of the teacher training programs, together with its emphasis on training only serving teachers. Progress is slow up the academic ladder with high annual failure rates in all the qualification examinations. For example, in 1990 the percentage of the candidates that passed were 13 percent for the First Teacher Exam; 14 percent for the Second Class Exam, and 10 percent for the First Class Teacher Exam. Most aspirants to training are thus denied access. Thus, almost anyone in Belize can be accepted for the teaching profession, but only a few can be accepted for training as a teacher.

19. Even if the current high rates of failure were to be mitigated, the courses are almost entirely oriented towards the academic school curricula and are generally irrelevant to the needs of teachers. Teachers who have studied for many years for a First Class Teacher Certificate will have received very little, if any, meaningful practical professional training.

20. Finally, the long JBTE course, which itself has had high failure and repetition rates in the past, has meant that teachers have been taken out of school for two years in order to achieve qualification. These factors contributed to very slow growth in the proportion of trained staff in the primary teacher cadre. Table 2 shows the growth in the percentage of trained teachers from 1970-90.

Table 2: Percentage of Teaching Force Trained 1970-90

Year	% Trained Teachers
1970	28.8
1975	33.6
1980	35.3
1985	43.4
1990	45.0

21. The aforementioned factors have limited access to primary teacher training, especially in rural areas where practicing teachers tend to have weaker academic backgrounds. Another impeding factor for rural teachers who do qualify for in-college training is that finding replacements is difficult. These limitations have contributed to disparities between the proportions of trained teachers in urban and rural areas. Recent MOE figures indicate that about 65 percent of rural teachers are unqualified as compared with 36 percent of urban or town area teachers.

22. Another issue is the relative growth of the teaching service. Although no recent comprehensive data is available, fragmentary evidence indicates that a high proportion of primary teachers are under 30 years of age. In 1979/80, 48% of primary teachers were under 25 and 83% were under 35 years of age; these percentages were roughly equally distributed between urban and rural schools. More recent data indicates that the age profile has changed little in the past decade. In 1991, 72% of those teachers applying for BTTC entry were 30 years of age while 92% were under 40 years of age.

23. The limited access to teacher training has resulted in demoralization of young teachers, continual exploration of career opportunities outside teaching, and further teacher attrition. Consequently, it is clear that increased access to teacher training represents a long-term investment in the improved quality of primary education.

B. Goals of the New System

24. Thus, the overall goal of the new system of teacher training is to establish a structure of support, qualifications and incentives which will permit Belize to improve the competence of its teachers and to reinforce their professional identities, and to attain more efficiently and then maintain a fully trained teaching force. This will be achieved by: strengthening the capacity of the BTTC and other units like CDU to deliver training in the Districts and to provide support for teachers; putting greater emphasis on training in professional skills; undertaking a program of professional upgrading; and introducing mandatory pre-service training for new teachers. These goals will be achieved within the constraints on recurrent education finance.

C. Structure of the New System

25. The new system will be characterized by a revised structure for training and qualification which will be achieved through full-time or part-time routes. This is summarized in Figure 1. The JBTE course will be phased out. In its place a Diploma in Teaching will be introduced. The Diploma will have two levels, Level 1 and Level 2, known as Diploma in Teaching Level 1 (DipTL1) and Diploma in Teaching Level 2 (DipTL2). The nature and orientation of these courses are given below.

26. The DipTL1 can be attained through one of three routes. First, a new teacher can receive it after taking a year-long pre-service training course and completing one semester of practice teaching (on full pay as a teacher). Second, a serving teacher can receive it by undertaking a one-year full-time in-service course accumulating practice teaching. Third, a serving teacher can attain it after taking a part-time two-year course.

27. The part-time two-year course leading to DipTL will be structured in two parts. The first year of part-time study will lead to a Professional Studies Certificate (PSC). The second year of study will lead to a DipTL1. A secondary goal of the Ministry will be to maximize the number of untrained teachers who acquire the PSC. This arrangement will enable teachers to immediately increase the range of their skills and thereby increase their effectiveness in the classroom with attendant recognition from Government for salary and qualification purposes. The scheduling of the second year of the PSC will be determined by teachers' performance in the first year, individual teachers' circumstances, and government priorities and requirements.

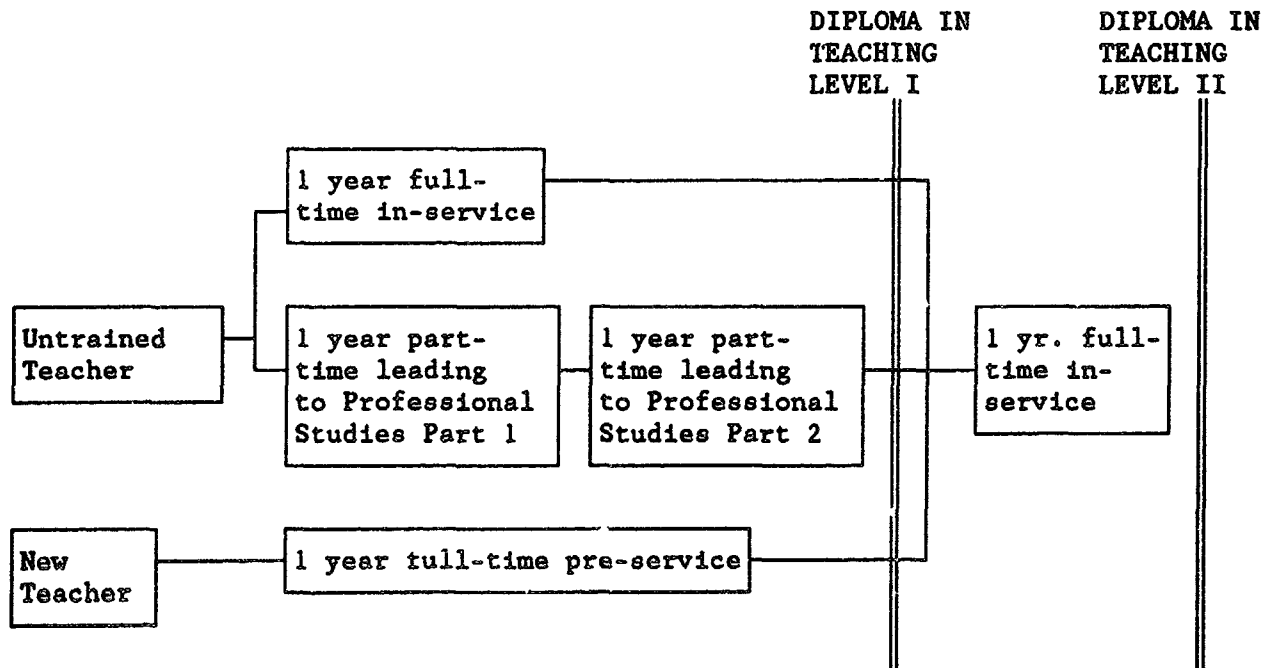


Figure 1: Proposed Structure of Training and Qualifications

28. Figure 2 shows the pattern of delivery of the part-time course. It can be seen that each year, two intra-mural sessions of three weeks each are included at BTTC. The first starts and the second concludes the year's study. In between teachers will attend workshops and tutorials at Education Centers in their district for four days each month. These sessions will be used to: (i) monitor progress in self-study, and (ii) set work programs and targets to subsequently guide teachers in the classroom. A teacher supervisor will be selected from the District Team cadres which will consist of BTTC staff, VSOs and experienced principals and teachers. These supervisors themselves will receive training for this task. Further support for each trainee will be provided in school by their principals who in turn will also receive training in professional leadership and quality management.

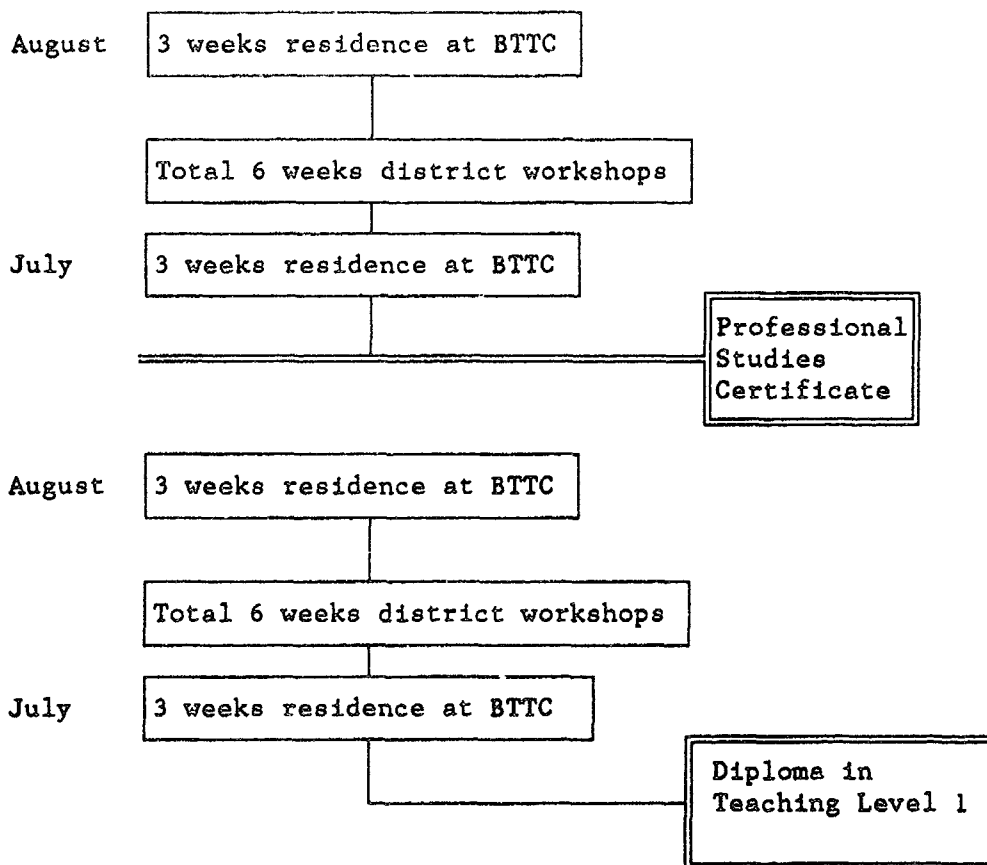


Figure 2: Structure of Part-time Teacher Training Course

29. The two courses will consist of approximately 9 intensive contact weeks each. Total contact hours for the two-year part-time cycle, assuming six-day (eight hours per day) weeks for the summer intra-mural courses, amount to between 700-800 contact hours plus directed self-study of approximately 6 hours per week. The total study period for the two-year program will exceed 1,200 hours.

Diploma in Teaching Level 1

30. The design of the DipTL1 will draw on an evaluation of the present pre-service one year program at BTTC. The present program has shifted the emphasis towards teaching skills in the classroom and any revision of the course contents will consolidate this change in emphasis from previous programs. In that the full-time and part-time routes lead to the same qualification, the course content will be similar but take account of individual trainees' needs and experiences, including any requirements for the consolidation of academic background. For the full-time programs which will combine classroom-experienced and new teachers, there may be some need for separation. The material for the course, including any academic upgrading, will be constructed in modular form to allow flexibility of delivery and opportunities for self-study.

31. The first year of the part-time route, leading to the PSC, will concentrate on the introduction and practical application of teaching methodologies. This same material will be covered in the full-time DipTL1. Material to be covered will include:

- a. Lesson Planning and Preparation using Curriculum Guides
- b. Classroom Management and Organization (furniture arrangement, group work, classroom control, etc.)
- c. Presentation and Demonstration (blackboard use, storytelling, etc.);
- d. Multi-grade Teaching
- e. Teacher-Pupil Interaction (questioning, discussion)
- f. Project and Practical Work
- g. Teaching Reading
- h. Teaching Writing
- i. Assessment
- j. Identification of Learning Difficulties; and
- k. Language

A cross-cutting component of program design will be the requirement for Teaching English as a Second Language (TESL). This will include TESL considerations in curriculum development, textbook analysis and utilization in the classroom, and classroom teaching and learning strategies for TESL. A BTTC and CDU staff member each will receive specialized training in order to advise on incorporating TESL into teacher training program design and implementation.

32. Training in appropriate classroom teaching methodologies will focus on the use of local case studies, exemplifying 'good practice'. This will include the analysis of video-tapes of 'good teachers in action' in Belizian classrooms and a study of transcripts of teacher-pupil classroom language to illustrate TESL methods. The course will focus on mathematics and language teaching and learning, but illustrate applications in other subject areas such as science and social studies.

33. The second year of the part-time course will build on the foundations of the PSC, and will reinforce and extend the methodological material therein presented. The further emphasis of the second year will be on subject teaching, stressing math and language, again with English as a second language (ESL) as a major issue. Teachers would also be encouraged to self-evaluate in the classroom and to take a wider view of curriculum development in the school and nationally. Pre-service training will concentrate more on teaching competencies, while the important academic deficiencies of in-service trainees will be identified and remedied. Otherwise, part-time and full-time courses will be the same and will lead to the same DipTL1.

Cooperation between CDU and BTTC: Course Development

34. A feature of the course development process and the final content of the programs will be its focus on familiarizing trainees with on-going curriculum development in Belize. Trainees will receive orientation in teaching the present primary curricula and be prepared for proposed curriculum reforms. CDU curriculum developers will form part of the BTTC course development teams. A BTTC/CDU steering committee will be established for this purpose and related activities.

Assessment

35. A variety of techniques will be used to evaluate the performance of trainees, including project work, written examinations and an assessment of teaching competencies acquired during training. Emphasis will be placed on the acquisition of teaching skills during the intra-mural programs and subsequently during the 'internship period'. Teachers will be assessed through formal examinations and classroom observation by supervisors at the end of the formal training period and once again after internship. A key element of the assessment will be trainees' competence in time-tabling the prescribed curricula into effective schemes of work for pupils.

36. BTTC staff, including the District Teams (para. 43), will receive training in assessment of trainee teachers. These training sessions will be designed and delivered by a newly appointed Head of Examinations, BTTC, who will receive overseas training for this purpose. The Head of Examinations will also design the Assessment components of the DipTL1 and DipTL2 courses to ensure consistency between 'theory' and 'practice' for trainees and their supervisors.

Diploma in Teaching Level 2

37. The DipTL2 will be open only to the holders of the DipTL1, although there may be instances where JBTE certificate holders would wish to consolidate their experience and qualifications and special arrangements would then have to be made. The aim of the DipTL2 will be to reinforce, consolidate and advance the teaching competencies of DipTL1 holders and, simultaneously address particular needs of the education system as they evolve. Its structure will include a core of advanced education studies based upon a thematic approach including:

- a. The School in Society
- b. Communication in the Classroom
- c. The Teacher as a Manager of Classroom Resources
- d. The Needs of Individual Pupils
- e. Language in the Primary School Curriculum

38. Second Class and First Teachers. The project does not propose to provide training and upgrading of these uncertified teachers, who form a minority of the teaching force. Many are near retirement, and most substantially fault academic standards appropriate for entry into the DipTL1 course. The MOE will investigate the appropriate means of assisting these teachers to improve their academic qualifications and teaching skills. If reserves permit, MOE could expand their adult and continuing education programs, especially in the rural areas, to support less qualified teachers, by holding extra-mural classes and developing academic and teacher training self-study packets. Targets of the resources which are outside those provided under the project will be determined by a Planning Unit study of the age and academic profiles of the Second Class and First Teacher cadre.

Salaries and Incentives

39. Teachers' Salaries. The salary scale for teachers will be revised by the end of 1991 and will include a new scale 7. This new scale reflects the intermediate nature of the qualification between current First Class teachers (scale 6) and JBTE qualified teachers (scale 8). Teachers attaining the DipTL1 would move to the new salary scale 7. In practice, because the scales overlap, many serving teachers on scale 6 earn more than the first step on scale 7. The Government already has an appropriate practice for the case where an employee moves up a scale on which the entry point is lower than the existing salary: the nearest equivalent of the current salary on the new scale is identified and an increment is added. Subsequent increments on the new, higher scale are, of course, greater in absolute terms than on the lower scale. Those who attained DipTL2 would move under the same conditions to scale 8.

40. Successful completion of the Professional Studies Certificate 1 would entitle a teacher to two increments on his or her current scale.

41. In addition, incentives for teaching in remote areas will be reviewed and improved on the basis of a study to be carried out by the PU under the project.

B TTC Staff Incentives

42. The proposed reorganization of B TTC is designed to provide more progression and promotion opportunities within the existing professional and salary structure. This will include the addition of another Vice-Principal post, an additional Head of Department post and the filling of vacancies at the lecturer and supervisor level. The increased range of opportunities, with attendant salaries, is designed to provide incentives for B TTC staff.

Additional allowances and training for BTTC staff, field supervisors, and District Team members will be provided under the project to take account of additional responsibilities and work loads associated with project activities.

Staffing the Delivery of Part-Time Courses

43. District Teams. The part-time courses leading, through the PSC, to the DipTl1, are part of a policy to decentralize the delivery of teacher training and support. In contrast to the current system which relies on BTTC staff to provide both instruction and supervision, the proposed system depends for its implementation on the creation and mobilization of District Teams. These teams, numbering on average five per district (of which there are six), would be composed of senior principals and teachers, as well as the District Education Officer (DEO) and/or the newly created Assistant District Education Officer (ADEO), and long-term VSO support; it will still incorporate existing BTTC lecturers and supervisors. The leadership and management of the various District Teams will be determined by team members, in consultation with the MOE and the Principal of the BTTC. Leadership will be on the basis of experience, ability and workloads and not designated on the basis of institutional functions and responsibilities.

44. Since the members of the District Teams will be practicing teachers with teaching responsibilities, it will be necessary for them to make provision to supply teachers to take their places during their absences from school. As the process of training principals proceeds under the project, District Team members will not need to supervise as intensively as in the initial years, when it is envisaged that they would spend about one day per trainee per month on supervision on top of the four days at the District Education Centers. Adequate supervision of trainees is an essential part of the training system, and is viewed as such by the Ministry.

45. The overall supervision of in-service part-time training in the districts would be conducted by a BTTC staff member, who would be in charge of each District Team. During the summer residential courses District Team members would participate in the training courses in BTTC, while the BTTC staff responsible for district training would make regular trips to participate in the delivery of the district workshops and seminars, as well as visit schools. BTTC has made provision for 6 staff to devote themselves to the overall supervision and coordination of the program, and their posts will involve considerable travel. Again, with the successful consolidation of the skills of the District Teams and principals, this role could well be reduced in the future.

Recruitment of Trainees

46. Part-Time Trainees. For the most part, trainees in the two-year part-time course will be drawn from existing First Class teachers and high school graduates. Selection criteria will be flexible, but in the initial years an effort will be made to ensure that all schools have a core of trained teachers with an emphasis on PSC holders. Other criteria will include the recommendations of principals, the level of current academic achievement and

particularly, in earlier years, geographic considerations leading to ease of program management. Supervision of teachers would be unnecessarily complicated if the supervisors are widely dispersed.

47. Full-Time Trainees. The selection of full-time in-service DipTL1 trainees would be weighted in favor of those with the highest academic credentials, and include the criteria set forth above. Pre-service applicants will be interviewed and given a short test. The recently established Planning Unit in the Ministry of Education will annually forecast teacher requirements, and will provide BTTC with numerical guidelines. DipTL2 trainees would be selected according to demand in the system for senior specialist skills.

Efficiency Gains

48. The new system will increase the annual output of trained teachers after a shorter training period. The project will invest in the upgrading of untrained teachers which will then allow the Ministry to sustain a steady-state system with a trained teaching force. Projections show that intake into the pre-service course should meet the requirements for new teachers, and that since untrained teachers are restricted from entering the system (though there will always be circumstances where some untrained teachers will be recruited) requirements for the in-service award of basic teaching qualifications will be significantly reduced. The training system would concentrate on pre-service training, in-service support, and higher level training.

49. The most immediate efficiency gain will be the reduction from two years to one year in the period of in-service full-time training, during which time teachers are paid full salary, and, at the same time, the reduction in the number of teachers taking the full-time in-service courses. Over time this will affect the ratio of active and qualified teachers to pupils: at present nearly ten percent of the total teaching force is being trained. As BTTC concentrates its efforts on part-time in-service training, the proportion of overhead allocated to producing qualified teachers will fall in contrast to professional development of already qualified teachers, reducing further the average cost of a newly qualified teacher.

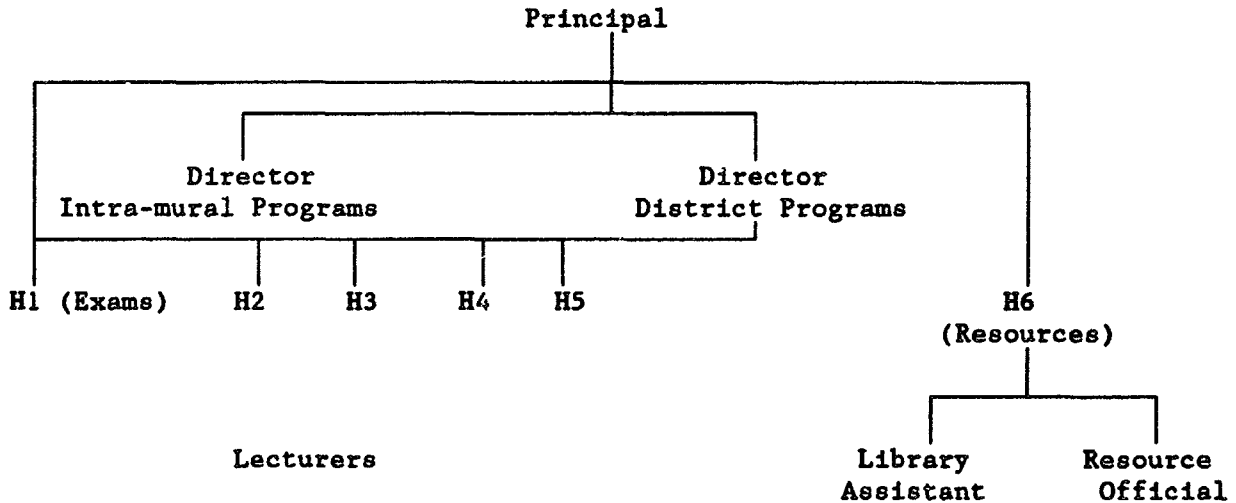
III. The Process of Introducing the Changes and the Role of the Project

50. The project will play a crucial role in introducing these changes into the teacher training system. The focus will be on BTTC institutional strengthening and development, and increased coordination with CDU activities through structural reorganization, management training, and in-country and overseas staff training. The objective will be to improve BTTC's capacity for intra-mural and decentralized delivery of teacher training, course development, and materials production; and the monitoring, assessment and evaluation of trainee teacher performance.

A. B TTC Institutional Development

51. It is proposed that by December 1991, the B TTC will reorganize along functional lines:

Proposed Reorganization of B TTC



52. The reorganization will require the following by the end of 1991:

- a. the appointment of a second Vice-Principal of District Programs;
- b. the redesignation of head of department responsibilities, including those of Examinations and Resources;
- c. a redesignation and re-organization of the physical plant, including designation of a single location for library, resource development and reprographic areas and specific office space for the senior management team and technical assistance;
- d. the refurbishment of the physical plant; early priority would be given to senior managers and heads of department office space and staffroom; and
- e. team-building exercises designed to define and reinforce new staff roles and functions.

Staff Development

53. B TTC staff persons will require professional development so that they might provide trainees with better examples of good teaching practice, and so that they themselves become familiar in detail with syllabi, materials, and appropriate styles and methods for teaching them. The project will provide technical assistance to support this. The training will not exclusively be conducted formally, but will also be built into the materials writing process: as new materials are developed, methods of using them will be discussed and actively tested.

54. BTTC staff will also receive training in management similar to that to be received by principals and school managers. They will be key agents in implementing changes in the system. At the same time, their working patterns and job descriptions will be reviewed to ensure that they are consistent with changes implemented. Management training will assist them to adapt to these new changes.

55. Study Tours for overseas staff in 1992 and 1993 will focus on the management and organization of teacher education, especially of in-service delivery, examinations, and assessment of teacher performance and resource management. In addition, in October 1991 the Principal of BTTC will assist in the evaluation of United Kingdom schools of education which are tendering for the project's technical assistance contract. This study visit will provide an opportunity for staff to familiarize themselves with UK developments in teacher education.

BTTC Staff Utilization

56. The restructuring of the primary teacher training will require reassessment of the roles and functions of the BTTC staff. The proposed reorganization (see para. 51) is the first step in this process.

57. During the project's lifetime, when significant development activity will be underway, it will be necessary to redefine the job descriptions of Vice-Principals, Heads of Department and other BTTC staff. These revisions will be determined through a series of team-building exercises throughout 1991 and 1992. These will be coordinated by the BTTC Senior Management Team (Principal and Vice-Principals, BTTC) with assistance from an outside facilitator.

58. The proposed reorganization plan is designed to minimize dissonance between BTTC responsibilities during the development period and after its implementation. Nevertheless, it will be necessary to continually review BTTC staff utilization over the period. This will be the responsibility of the BTTC senior managers in consultation with the governing body and MOE. For example, it is likely that during post-project implementation, BTTC staff in conjunction with District Education Officers and CDU staff will increasingly assume quality management functions at the classroom level. In this case, BTTC staff will require further training in quasi-inspectorate techniques. (See paras. 72-73).

District Teams

59. Also supported under the project, District Teams will receive similar training, which in some cases will be linked to the training of principals and school managers. Training will concentrate on the areas of professional leadership and techniques for monitoring and evaluating classroom teacher performance. The District Team members will receive on-the-job training through participation on the course development team. Three VSOs will be recruited in 1992 and 1993 to provide assistance, and where appropriate, leadership in the training and management of District Teams. From September

1993, these volunteers will be located close to the selected District Education and Resource Centers in order to support their managements.

60. The Head of Resources, BTTC, will fill a support role in the management and organization of the District Centers, linked to the VSO and local staff network. ODA will provide books and teaching/learning resources for these centers. The support roles of the various institutions utilizing these Centers (BTTC, CDU, Government Book Store, Education Officers) will be rationalized to maximize their effectiveness.

Course Development and Materials Production

61. Under the direction of the Vice-Principals, two course development teams (Intra-Mural and District) will be established in 1991 to design, plan and manage the new DipTL1 programs. The Head (Examinations) and the Head (Resources) will play support and advisory roles for both groups in the areas of, respectively, teacher assessment and course materials production. Given the common elements of the full-time and part-time programs, the senior management team (Principal, two Vice-Principals) will manage the coordination of the two task forces. The priority for course and materials preparation will be the professional studies components of the part-time and full-time course. Although the first intake into the part-time courses is not planned until July 1993 (see below), much of the material to be used will be incorporated into the pre-service/in-service full-time course, started in 1990 and to be fully developed during the period of the project. The courses will be prepared by writing teams from BTTC and the District Teams supported by Technical Assistance. The TA Teacher Educator, scheduled to arrive in February 1992, and one of the VSO team members, scheduled to arrive in September 1992, will support and advise the development teams.

B. Program Implementation

62. Table 3 shows the enrollments in each type of course per year, the projected output of each type of course per year, and the total stock of teachers by qualification. Teacher training ends under the project after 1996/97. Table 3 shows an annual total of about 150 full-time trainees in BTTC. By the beginning of school year 1997/98, the project will have provided places to nearly 1,000 teachers, which represents the total number of teacher enrollments over the period less JBTE enrollments, which are not part of project activity.

Table 3: Teacher Training Enrollments, 1992-2000

TOTAL ANNUAL ENROLLMENT									
	1992-3	1993-4	1994-5	1995-6	1996-7	1997-8	1998-9	1999-00	
Part-Time									
									TOTALS
PS1	0	60	60	60	60	60	60	60	420
DipTL1	0	0	59	59	59	59	59	59	353
TOTAL	0	60	119	119	119	119	119	119	773
Full-time									
DipTL1	60	60	120	120	120	120	120	120	840
DipTL2	0	0	30	30	30	30	30	30	180
JBTE	142	55	0						197
TOTAL	202	115	150	150	150	150	150	150	1217
GRAND TOTAL	202	175	269	269	269	269	269	269	1990

63. Table 4 shows the annual output of the system, assuming attrition of 2 percent per course per year. The selection of trainees and the appropriateness of the courses will be designed to minimize failure, which represents a waste of resources. Were the current system of teacher training to continue with its high repetition and failure rates, the maximum annual output from a similar level of enrollment would be about half the level the full-time course, or around 80 graduates per year. Although the level of training will be somewhat lower, it will be more relevant, there will be significant quality improvement and an increase in skills of the teaching force.

Table 4: Teacher Training Outputs, 1992-2000

TOTAL ANNUAL OUTPUT (from previous school year)									
	1992-3	1993-4	1994-5	1995-6	1996-7	1997-8	1998-9	1999-00	
Part-Time									
PS1	0	0	59	59	59	59	59	59	
DipTL1	0	0	0	58	58	58	58	58	
TOTAL	0	0	59	117	117	117	117	117	
Full-time									
DipTL1	0	59	59	118	118	118	118	118	
DipTL2	0	0	0	29	29	29	29	29	
JBTE	90	74	49						
TOTAL	90	133	133	147	147	147	147	147	

Notes: Attrition rate from courses assumed at 2.0 % per year.

64. Annual output does not represent the total addition to stocks of trained teachers because it is assumed that teachers taking the PSC proceed to the second year of part-time training. The net addition to trained teacher stock under the project will be over 700 teachers, as shown in Table 5. This includes those being trained, shown in the table as additional stock in the next year. This is to say that at project completion, the output from the last year of the project would have joined the teaching force, but would not include the JETE output obtained during the period of phasing out the system. Given an estimated requirement of about 2,200 teachers in 1996/97, the percentage of the teaching force as a whole having received training would be over 75 percent. Most of these, over 500, would hold DipTLL certificates.

Table 5: Teacher Training Stocks, 1992-2000

TOTAL NUMBER OF TRAINED TEACHERS		1992-3	1993-4	1994-5	1995-6	1996-7	1997-8	1998-9	1999-00
No of teachers	PS1	0	0	59	60	61	62	63	65
with training	DipTLL	0	59	118	264	409	555	701	847
(includes some	DipTLL	0	0	0	29	59	88	118	147
under training)	JBTE	984	1074	1148	1197	1197	1197	1197	1197
TOTAL Qualified Teachers		984	1133	1324	1550	1726	1903	2079	2256
Total Teachers Required		2034	2089	2148	2170	2224	2287	2355	2426
Qualified next year			202	175	180	180	180	180	180

Planning Training Targets and Locations

65. The previous targets are only indicative of enrollment and output. As part of the project, a management information system (MIS) is being developed and is located in the MOE Planning Unit. One function of the MIS will be to collect data on annual teacher training needs in order to inform training needs projections. The first data will be available in mid-1992 in order to assist in planning the September 1992 BTTC intake levels and to project part-time enrollment levels for 1993 and beyond.

66. The MIS will provide data on the priority districts for in-service delivery. The early selection of Districts will allow the Principal of BTTC to prioritize in-college programs for teachers from those districts not participating in the first phase of the district INSET program. This will ensure equity in access to teacher training opportunities.

Recurrent Budget Implications

67. MOE expenditure on salaries will rise within manageable limits as more teachers are qualified more quickly because of the lower level (scale 7 as opposed scale 8) of a newly qualified teacher's salary scale, and because of the longer part-time training period. The Ministry of Finance currently budgets a norm of 4 percent for the annual increase in the total primary teacher salary bill, covering wage drift and newly trained teachers' movement

to new scales. It is estimated that the average rate of annual growth of the primary teacher salary bill will rise between 1 and 2 percent per year to rest between 5 and 6 percent per year during the period of upgrading, and will then fall as most teachers receive incremental rather than scale changes. The effect on the total Ministry budget will be between 0.5 and 1 percent per year.

68. The staff/student ratio of BTTC would rise as the changes take effect. However, uncertainty over the numbers of pre-service trainees has already been noted, as well as development activities of the staff. Six staff supervisors would be allocated to development and management of the district-based courses, and the overall staff/student ratio for full-time staff would be about 10:1. Allowance for sabbatical absences and other out-of-college training would yield a ratio of about 12:1. Staff utilization would be reviewed during the course of the development period and appropriate measures taken to ensure efficiency.

Technical Assistance

69. Technical assistance (TA) under the project will be provided by ODA through a major UK school of education. This will be an integrated package of support for teacher education, curriculum development, assessment and examinations, and planning. The management and operations of the TA inputs will be formalized in order to maximize coordination of inputs and guarantee complementarity and consistency of project activities.

70. Support for teacher education will consist of:

- a. a teacher educator (24 mm) located at BTTC
- b. short-term TA (6 mm) focusing on delivery mechanisms at the district level
- c. UK and in-country training for management training, examinations/assessment and resource management
- d. book aid for primary schools (teachers and pupils materials) and the district resource centers; and
- e. VSOs (72 mm) for course development, District Team participation/leadership and resource center management

71. To coordinate technical assistance for teacher education, curriculum development and assessment/examinations, a formal Project Steering Committee will be established for these three areas. The Committee will consist of the Principal of BTTC, the Head of CDU, the two long-term TA and other senior managers.

Sustainability

72. The proposed reorganization of BTTC and formalized cooperation with CDU is designed to ensure sustainability of institutional functions beyond the project lifetime. The increased capacity of the outreach functions of BTTC will sustain the development and delivery of general in-service teacher education (focusing on curriculum adoption and quality maintenance), in

cooperation with CDU. The training for principals, focusing on school management and teacher supervision, will ensure further quality maintenance.

73. The development of a staff cadre in BTTC, CDU and the Examination Unit with skills in teacher supervision, classroom observation techniques, and curriculum design and development will provide for a quasi-Inspectorate. Teams from these institutions, in conjunction with MOE staff and District Education Officers, will have the capacity to conduct whole school reviews as part of the quality monitoring function of the Ministry.

BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT
PRIMARY SCHOOL CONSTRUCTION PROGRAM: School Facilities Improvement Program (SFIP)

Srl. #	Schools	Location	District	Management	Type of Civil Wrk	# of New Classrooms	Re- marks
1.	All Saints	Belize City	Belize	Anglican	Extension	8	Urban
2.	Ebenezer Inf.	Belize City	Belize	Methodist	Ext/Renov	8	Urban
3.	Ebenezer Prim.	Belize City	Belize	Methodist	Ext/Renov	6	Urban
4.	Lake Indepnd. Low	Belize City	Belize	Methodist	New	2	Urban
5.	Lake Indepnd. Prim	Belize City	Belize	Methodist	New	2	Urban
6.	Maskall	Maskall	Belize	Roman Cath.	Ext/Renov	2	Rural
7.	Queen Sq. Middle	Belize City	Belize	Anglican	Renov.	-	Urban
8.	St. John Vianney	Belize City	Belize	Roman Cath.	New	8	Urban
9.	Willows Bank	Willows Bank	Belize	Anglican	New	3	Rural
10.	San Francisco	Orange Wlk Twn	Orange Walk	Roman Cath.	Extension	6	Urban
11.	San Pablo	Orange Wlk Twn	Orange Walk	Roman Cath.	Ext/Renov	6	Rural
12.	Independence	Stann Creek	Stann Creek	Roman Cath.	New	15	Rural
13.	San Roman Infant	Stann Creek	Stann Creek	Roman Cath.	New	5	Rural
14.	Silk Grass	Stann Creek	Stann Creek	Methodist	New	4	Rural
15.	Pueblo Viejo	Pueblo Viejo	Toledo	Roman Cath.	New	5	Rural
16.	San Antonio	San Antonio	Toledo	Roman Cath.	Extension	4	Rural
17.	San Jose	Toledo	Toledo	Roman Cath.	Extension	4	Rural
18.	San Miguel	Toledo	Toledo	Roman Cath.	New	6	Rural
19.	St. Peter Claver	Toledo	Toledo	Roman Cath.	Ext/Renov	6	Urban
						105	

BELIZE

PRIMARY EDUCATION DEVELOPMENT PROJECT

Textbook Program

1. Introduction. The proposed Primary Education Development Project aims to effect substantial improvements in the quality of primary education in Belize by: (a) upgrading the knowledge, skills, and overall competence of primary school teachers, (b) improving the quality and availability of educational facilities and resources for both teaching and learning, and (c) strengthening the planning and management of education to enable Government to improve the cost-effectiveness of its expenditures and maximize returns on educational investments.

2. The proposed textbook program is a key element in the strategy to improve the resources available in the classroom for teaching and learning. Although there has been no study of textbook availability in Belize, it is generally accepted that there is a serious shortage of textbooks in Belize's primary schools, especially in rural and remote areas, but also in many urban schools. However, the situation is beginning to improve. The Books for Belize program administered by the Ranfurly Library Service has helped make textbooks available for sale in Belize. But even with a substantial government subsidy, relatively few parents appear to have purchased them. The poor sales may be because the program has not been well publicized. Other factors include parental apathy, inability to pay and weak sales promotion by the DFOs. The BRC Printing in Benque Viejo also sold primary school textbooks throughout Belize--about 52,000 copies over the past 15 months--many at highly subsidized prices due to the help of CODE.

3. Textbook Policy. The Government has taken important steps over the past year in defining a textbook rationalization policy. In accordance with this policy MOE has approved a fixed number of books for each grade level and subject, limiting the number of alternatives to three books for each grade and subject. It has established criteria against which books will be chosen in the future and has planned to include approved textbooks in the curricula for training teachers. The ultimate aim of government textbook policy is to make a basic set of textbooks available at affordable prices to all students. While achieving that objective will take time, there are measures which the Government can take to greatly improve the availability of textbooks in the school, through a textbook loan system. The loan system would not replace the current arrangement for selling textbooks, but rather supplement it to enable all of Belize's primary school students to have access to school textbooks.

4. Textbook Loan System. Under the proposed program, MOE would provide a basic set of textbooks/workbooks to students for a nominal annual fee per book. The basic set would consist of books on math, English, and reading. Textbooks on social studies, being prepared by the CDU, would be added to the basic list, when available. TESL readers prepared by the CDU for the 7 to 9 age group would also be included in sets for schools requesting them. The

textbooks would be loaned to parents for the school year on the understanding that they keep the books in good condition and return them at the end of the year. Parents would be charged a replacement fee for lost or seriously damaged textbooks. The textbook loan fees would be collected by teachers/principals and then kept in a Bank account by the principal for use in purchasing textbooks or other books for the school. The principal of each school would be accountable to the DEO for the funds. When parents cannot afford to pay even the nominal fee, children will not be deprived of textbooks. However, income from sales will thereby be reduced, and the school will have less to purchase other educational materials.

5. Distribution Arrangements. MOE would be responsible for purchasing and distributing the textbooks for the loan system. In order to determine the quantities of each textbook to be purchased, MOE would consult each school principal on preferences. Selections would be made by the school principals from the official textbook list (para. 3) and forwarded to MOE for compilation. The purchasing would be done in bulk quantities to reduce costs, allowing sufficient lead time to ensure that they are distributed to the schools by the beginning of the school year. A possible schedule might be as follows:

<u>Tasks</u>	<u>Dates</u>
Send textbook lists to principals	January/February
Compile textbook selections and place orders with publishers	February/March
Receive books and distribute to schools	May/June
Books distributed to students	September

6. The textbooks for the loan system would be distributed by the Government Bookstore through the District Education Officers (DEOs). The Bookstore would fill the orders for each school in a district and send them on to the DEOs for distribution to the principals. The Bookstore would use a private trucking company to distribute the books to the DEOs. The DEOs would be assisted by the managers of the denominational schools, principals/teachers and parents to deliver the books to the schools as soon as possible. Storage facilities would be identified in each district to accommodate the quantity of books to be distributed to the schools.

7. Management and Administration. The proposed system would be managed as follows:

- The CEO, with the advice of the Textbook Policy Committee and the managers of the church schools, would provide policy and operational guidance to the manager of the textbook program. The CEO would: (a) approve the official list of textbooks; (b) set the ratio of textbooks to students; (c) set the loan fees for textbooks; (d) approve the

quantities of textbooks ordered by MOE; and (e) monitor the operation of the program and report to the Minister;

- The Manager of the Government Bookstore would manage the textbook program. Her main tasks would be to: (a) prepare annual implementation plans and budgets for the textbook program; (b) collect data on textbook needs and analyze results; (c) arrange bulk purchasing of textbooks from publishers; and (d) receive shipments of textbooks from publishers and organize their distribution to the primary schools with the assistance of the DEOs.

- A VSO would be assigned for an initial two-year period to assist the Manager of the Government Bookstore in planning, implementing and monitoring the textbook program;

- The PIU would provide technical support to the Manager in the planning and implementation of the program;

- The DEOs would have three main responsibilities: (a) to assist the Manager in collecting and tabulating information on the textbook needs of all the primary schools in their district; (b) to distribute the textbooks to the schools; and (c) to monitor the collection and use of the loan fees paid to principals;

- The principals would have the following responsibilities: (a) to inform the DEOs of their textbook selections and quantities needed to ensure at least one set of textbooks for every two students in their schools; (b) to distribute the textbooks in their schools and collect the loan fees from parents; (c) to maintain accounts of the fees and use them for purchasing other educational materials such as workbooks for their schools; and (d) to report to the DEOs on the loan fees collected and their use.

8. Quantities. The annual quantities of textbooks distributed by MOE would depend upon four factors: the costs of the textbooks/workbooks, book life, book to student ratios, and the education budget. If MOE were to adopt the loan system, it could begin in 1991/92 by providing each primary school with a basic set of textbooks for 1 of every 3 students. The estimated replacement costs would be about BZ\$375,000 per year, if all books had to be replaced in 1992/93. However, it could be substantially less if the book life could be extended beyond one year. It is important to note that the proposed ratio for the loan system would not likely discourage parents from buying their own copies of textbooks. If they can afford it, parents would prefer that their children have their own books rather than share them with other children. Where this happens, the ratio of books to children would greatly improve.

9. The proposed textbook program would make use of the unsold textbooks from the Books for Belize Program, as well as the income from post sales to purchase new books. All the DEOs have inventories which need to be taken into account in planning the distribution. In estimating quantities of books for

purchase, MOE must also take into account those schools where teachers are already using BRC textbooks and wish to continue to do so.

10. Project Assistance. The proposed project would provide three types of assistance: (a) technical assistance by a textbook specialist to help MOE complete the design, implement and monitor its textbook program; (b) a VSO, Textbook Supply Assistant to assist the manager of the Government Bookstore with all aspects of the program; and (c) financial assistance to enable MOE to phase in budgetary support for textbook purchases and distribution costs over a five-year period at the rate of 20 percent annually beginning in the 1992/93 school year. The estimated cost of the scheme in the first five years, including all contingencies, would be roughly BZ\$2.50 million (US\$1.25 million) according to the following schedule:

	<u>1992/93</u>	<u>1993/94</u>	<u>1994/95</u>	<u>1995/96</u>	<u>1996/97</u>	<u>Total</u>
External Funding	495	396	297	198	99	1,485
MOE Recurrent Budget	-	99	198	297	396	990

BELIZE

PRIMARY EDUCATION DEVELOPMENT PROJECT

Education Planning Unit

1. Background

1. The Ministry of Education (MOE) established a Planning Unit (PU) in 1990. The Deputy Chief Education Officer (DCEO), who has responsibility for a number of other areas including Curriculum Development and Examinations, was assigned to head the Unit. The MOE has established one position for a planner and is due to establish a second. The Unit has been supported by the ODA with technical assistance from a statistician.

2. Statistics. Data on education in Belize has always been inadequate. Until 1986/87, basic data on enrollments has been collected by the Central Statistics Office (CSO). The Ministry then received assistance in establishing a statistical system from USAID. The Belize School Monitoring System (BSMS) was set up. However, for a number of reasons, in particular its complexity, it has not been maintained. It appears that even enrollment data is unreliable. Furthermore, it is uncertain how many schools and teachers are in the system, and little is known about the school map: little information is available upon which to base measurements of both the qualitative and quantitative performance of the system. Financial data has been almost entirely absent from the education planning system.

3. Since September 1990 the Unit has concentrated on a simpler system of management information (MIS). It has also been responsible for drafting the National Five-Year Plan for Education.

2. Development of the Unit and the Project

4. The project will support the Unit in furthering work in four areas:

- (a) Development of the MIS;
- (b) Strengthening education planning capabilities;
- (c) Undertaking special studies; and
- (d) Training.

5. MIS Development. The MIS system will cover all basic data required for publication in an annual statistical digest. In addition, it will collect data for MOE use. Some use will be made of existing administrative sources, and other data will be collected in annual surveys. Annual published statistics will include:

- (a) Total enrollments at all levels; at post-primary level by institution;
- (b) Enrollments by sex at all levels;

- (c) Wastage and repetition at primary and secondary levels;
- (d) Primary schools by size, district, urban/rural, management;
- (e) Number of primary classrooms in use;
- (f) Number of primary schools with multi-grade teaching by classes per teacher;
- (g) Secondary schools by management/district;
- (h) Number of teachers by qualification, by district, and by management;
- (i) Pupil/teacher ratios by district;
- (j) Textbooks in use by district, and data on textbooks per pupil;
- (k) Examination results; and
- (l) Education expenditures including cost per pupil/students.

6. The cycle of data collection is designed to fit into the budget cycle, and is as follows:

September	Workshops for District Education Officers and Principals to familiarize them with the system Distribution of forms
October	Data collection Submission of forms to PU
November	Data checked in PU Data entry into database
December	Provisional key figures prepared
January	Completion of checks and database entry
February	Publication of statistical report
May-June	Feedback on system and modifications as appropriate New forms prepared and printed for next round

The schedule for secondary school collection has yet to be established.

7. Strengthening Education Planning. MOE's capacity for policy analysis is limited by its resources to monitor and evaluate the range of activities in the system as a whole. In particular, the country has prepared its first major Education Plan which has established goals and targets to be achieved over the next five years. Therefore the PU will require support in strengthening its capabilities to monitor the progress of education initiatives, provide feedback to the Chief Education Officer, and advise on policy formulation.

8. Apart from the MIS work, the PU will need to undertake appropriate analysis to provide inter alia guidelines to the Teachers College on the annual intake of new teachers into the pre-service course; enrollment and other data to the Government Bookstore for its textbook program; data on teacher posting for the principal education officers. The Unit's forecasting

capacity must be strengthened in order to enable it to accomplish routine planning, as opposed to data collection, and daily tasks. The Unit will also set up a mechanism by which a schedule of construction work can be properly planned in conjunction with church managements.

9. Special Studies. A number of special studies programs are needed. These include completion of the school mapping exercise, further detailed work on education finance, a study of teacher attrition in order to determine the annual numbers required for new teachers, and multiple-shift schooling.

10. Training. The PU staff will require training overseas in education planning. In addition, training can be provided in situ which concentrates on the particular issues described above relating to planning, education finance, monitoring, and forecasting. The project will also support training for principals and education officers which will ensure their commitment to developing a sound base for data collection.

BELIZE

PRIMARY EDUCATION DEVELOPMENT PROJECT

Technical Assistance and Travel and Study Fellowships

A. Teacher Training Component

Training Adviser (24 months) - would be based at BTTC to assist the Principal in implementing the proposed reforms in the teacher training system and provide on-the-job training for staff of the College.

Training Specialist (6 months) - would provide short-term assistance to BTTC in the design and implementation of training in specialized areas such as distance education and teaching English as a second language (TESL) geared to primary school teachers in the districts.

Fellowships (14 months) - would support travel and study for selected staff of BTTC to countries within and outside the region to learn about teacher training and/or to acquire short-term training for their own professional development at the link institution in the United Kingdom.

VSO volunteers (72 months) - Three volunteers would be assigned to work at BTTC and in the districts for two years each to support the in-service teacher training courses.

B. Education Development Component

General Education Specialist (30 months)- would be based at the CDU to assist with: (a) curriculum development and instructional materials production, (b) development of continuous classroom evaluation, diagnostic and achievement testing for feedback into policy analysis, teacher training and curriculum/materials development, and (c) implementation and monitoring of the textbook program.

Textbook Program Specialists (6 months)- would provide short-term assistance to MOE on (a) textbook program planning, implementation, and monitoring, and (b) textbook writing and production, (c) TESL materials acquisition and production.

Assessment Specialists (12 months)- would provide short-term assistance on item writing, computer applications, and test design and implementation.

Fellowships (30 months)- would support training on assessment and curriculum development, including TESL in the U.K. and travel and study within and outside the Caribbean.

VSO (24 months) - One volunteer to be assigned to the Government Bookstore to assist the manager in planning and implementing the textbook program.

C. Planning and Management Component

Education Planner/Statistician (24 months)- would be based in the MOE Planning Unit to help the Unit develop an MIS and school map, and to conduct special studies.

Planning Specialist (6 months) - would assist MOE in conducting studies for educational planning.

Management Advisory and Training Specialists (6 months)- would assist MOE in improving its management in areas such as setting objectives, monitoring and evaluating performance, and increasing motivation and staff productivity; it would also help introduce improvements in MOE's budget process, budget monitoring and accounting systems.

* Fellowships (18 months) - would be used to train the planning officers/statisticians in education planning and statistics.

D. Summary

Teacher Training Specialist	24 months
General Education Specialist	30 months
Education Planner/Statistician	24 months
Training Specialists	6 months
Assessment Specialists	12 months
Textbook Specialists (*)	6 months
Planning Specialists (*)	6 months
Management Specialists (*)	<u>6 months</u>
	114 months
VSOs	96 months
Fellowships/Study Tours	62 months

(*) Asterisk indicates World Bank financing.

**BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT**

IMPLEMENTATION SCHEDULE

CIVIL WORKS

ACTIVITY	CY 92	93	94	95	96	97	98
NEW CONSTRUCTION							
1. Site Selection	oo						
2. Site Acquisition	ooooo						
3. Site Survey & Soil Test	ooooo						
RENOVATION							
1. Technical Surveys for Renovation	ooooo						
2. Preliminary Design*	oooooooooooo						
3. Final Drawings		ooooo	o	ooo	ooo		
4. Bid Documents*		oooooo	ooo	o			
5. Bidding*	o		o	o	o		
6. Bid Evaluation*		o	o	o	o		
7. Contract Signing*			o	o	o		
8. New Construction			oooooooooooooooooooooooooooo				
9. Renovation/Extensions		ooooooooooooo	o				
10. Guarantee Period			oooooooooooooooooooooooooooo				

*Bank Review

**BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT
IMPLEMENTATION SCHEDULE
TECHNICAL ASSISTANCE**

CY	92	93	94	95	96	97	98
LONG TERM SPECIALISTS							
1. Teacher Training Specialist	o	o	o	o	o	o	o
2. Gen. Education Specialist	o	o	o	o	o	o	o
- Textbooks		o	o	o	o	o	o
- Curric. Development		o	o	o	o	o	o
- Assessment		o	o	o	o	o	o
3. Educ. Planner/Statistician	o	o	o	o	o	o	o
SHORT TERM SPECIALISTS							
1. Textbook Program Specialist	o	o	o	o	o	o	o
2. Planning & Management							
- Pilot multiple shift program	o	o	o	o	o	o	o
- School facilities maintenance plan		o	o	o	o	o	o
VSO VOLUNTEERS							
1. Teacher Training							
- BTTC (1)		o	o	o	o	o	o
- District Centers (2)		o	o	o	o	o	o
2. Bookstore Management	o	o	o	o	o	o	o
OTHER							
Training Fellowships	o	o	o	o	o	o	o

BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT

Implementation Schedule

Estimated Annual Contractual and Other Payments
(US\$ million equivalent)

Project Element	Pre-Project	Project Year							Total Payment	Remarks
		1	2	3	4	5	6	7		
<u>Loan Timing</u>										
Sign/Effec/Close	xx	xx						xx		
<u>Works</u>										
Prequal/Bid/Award		xx	xx	xx	xx					
Construction		0.55 xxxx	0.71 xxxx	0.80 xxxx	0.71 xxxx	0.67 xxxx	0.63 xxxx	0.59 xxxx	4.66	LCB & shopping
Maintenance		0.03 xxxx	0.05 xxxx	0.06 xxxx	0.06 xxxx	0.06 xxxx	0.06 xxxx	0.06 xxxx	0.38	n.a.
<u>Goods</u>										
Vehicles		0.11 xxxx	0.07 xxxx	0.05 xxxx					0.23	ICB
Equipment		0.11 xxxx	0.12 xxxx	0.14 xxxx	0.20 xxxx	0.18 xxxx	0.13 xxxx	0.12 xxxx	1.00	ICB, LCB & shopping
Furniture		0.05 xxxx	0.06 xxxx	0.07 xxxx	0.08 xxxx	0.08 xxxx	0.07 xxxx	0.06 xxxx	0.47	LCB
Books & Textbooks		0.17 xxxx	0.18 xxxx	0.19 xxxx	0.19 xxxx	0.20 xxxx	0.21 xxxx	0.21 xxxx	1.35	Shopping
Consumable & Training Material		0.03 xxxx	0.03 xxxx	0.03 xxxx	0.04 xxxx	0.04 xxxx	0.04 xxxx	0.04 xxxx	0.25	Shopping
<u>Service Contract</u>										
Architectural Fees		0.05 xxxx	0.06 xxxx	0.07 xxxx	0.07 xxxx	0.06 xxxx	0.06 xxxx	0.05 xxxx	0.42	n.a.
<u>Consultancies</u>										
Technical Assistance		0.39 xxxx	0.42 xxxx	0.44 xxxx	0.37 xxxx	0.11 xxxx	0.07 xxxx	0.05 xxxx	1.85	Shopping
Training		0.11 xxxx	0.13 xxxx	0.20 xxxx	0.27 xxxx	0.28 xxxx	0.28 xxxx	0.29 xxxx	1.56	n.a.
<u>Miscellaneous</u>										
Incremental Salaries		0.04 xxxx	0.05 xxxx	0.06 xxxx	0.07 xxxx	0.08 xxxx	0.08 xxxx	0.09 xxxx	0.47	n.a.
TOTALS (Bank-Financed)		1.64 (0.89)	1.88 (1.03)	2.11 (1.15)	2.06 (1.14)	1.76 (1.03)	1.63 (0.96)	1.56 (0.93)	12.64 (7.13)	

**BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT**

MONITORING INDICATORS

PROJECT OUTPUTS	MONITORING INDICATORS	TARGET DATES
1. Increased number of teachers trained and using improved teaching methods in the classroom	Certified teaching force increased from 45% to 80%	60% certified by Dec. 31, 1995; 80% certified by Dec. 31, 1998.
2. Enhanced school environment		
a. School facilities improved through renovations, extensions and new construction	105 classrooms rehabilitated/constructed	50 classrooms rehabilitated by Dec. 31, 1993; 55 new classrooms constructed by Dec. 31, 1996.
b. Reduction of overcrowding in selected schools through multiple shifts	Initial pilot scheme for 3 urban schools	Initiation of pilot scheme in September 1993 school year; continuation and expansion subject to pilot results
c. School Facilities Maintenance Program in place	Preparation of School Facilities Maintenance Plan and annual investment budget increase to US\$300,000 equivalent.	By December 31, 1992
3. New and revised curricula and teaching guides, including TESL materials, disseminated and used in the classroom	Primary school teachers using new & revised curricula in schools.	Infant I & II classes by September 30, 1994. Lower primary classes by September 30, 1996. Upper primary classes by September 30, 1998.
4. Increased availability and use of basic textbooks in primary schools	Primary school students provided basic set of textbooks.	50% by Sept. 30, 1993. 75% by Sept. 30, 1994. 100% by Sept. 30, 1995.
5. Educational Planning Unit, established, staffed, and functioning	Establishment of Management Information System. Annual statistical digest printed & distributed. School map Completion of special studies	Dec. 31, 1992. Dec. 31, 1992, and by Dec. 31 annually thereafter. Dec. 31, 1993. Primary Education Assessment (Baseline), Jan. 31, 1993; 5-year school construction plan, Dec. 31, 1993; study on Teachers, Dec. 31, 1994.
6. Introduction and use of national diagnostic/achievement tests and assessments at the primary school level	Diagnostic tests designed, disseminated, and used in math and language	Baseline by Dec. 31, 1992; lower grades by Sept. 30, 1993; upper grades by Dec. 31, 1998.
7. Strengthened district-level support services to schools	Construction & equipping of 3 new education centers Provision of books and other educational materials to all teacher resource centers District level in-service training mechanism in place	By Sept. 30, 1993. 3 Districts by Sept. 30, 1993. Remaining districts by Sept. 30, 1994.
8. Strengthened management of education system	Initial in-service training for all primary school principals completed.	Dec. 31, 1995.

BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT
Forecasts of Expenditures and Disbursement

Bank Group Fiscal Year and Semester	Expenditures		Disbursements		Cumulative As % of Total	Disbursement Profile (%) of Regional Education Projects	Semester From Appraisal Date
	Semester	Cumulative	Semester	Cumulative			
<u>FY92</u>							
Jul. 91-Dec. 91							1
Jan. 92-Jun. 92	0.82	0.82	0.50/a	0.50	7	3	2
<u>FY93</u>							
Jul. 92-Dec. 92	0.82	1.64	0.39	0.89	12	6	3
Jan. 93-Jun. 93	0.94	2.58	0.52	1.41	20	10	4
<u>FY94</u>							
Jul. 93-Dec. 93	0.94	3.52	0.52	1.93	27	14	5
Jan. 94-Jun. 94	1.05	4.57	0.57	2.50	35	22	6
<u>FY95</u>							
Jul. 94-Dec. 94	1.05	5.62	0.57	3.07	43	34	7
Jan. 95-Jun. 95	1.03	6.65	0.57	3.64	51	42	8
<u>FY96</u>							
Jul. 95-Dec. 95	1.03	7.68	0.57	4.21	59	50	9
Jan. 96-Jun. 97	0.88	8.56	0.52	4.73	66	58	10
<u>FY97</u>							
Jul 96-Dec. 96	0.88	9.44	0.52	5.25	74	66	11
Jan 97-Jun. 97	0.82	10.26	0.48	5.73	80	78	12
<u>FY98</u>							
Jul 97-Dec. 97	0.82	11.08	0.48	6.21	87	86	13
Jan 98-Jun. 98	0.78	11.86	0.46	6.67	94	98	14
<u>FY99</u>							
Jul. 98-Dec. 98	0.78	12.64	0.46	7.13	100	100	15
Jan. 99-Jun. 99							

Closing Date: June 1999

a/ Special Account included

BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT

PROJECT COMPONENTS BY YEAR

		Totals Including Contingencies (US\$ million)							
		92	93	94	95	96	97	98	Total
A.	<u>TEACHER EDUCATION</u>								
	1. STRENGTHENING THE TEACHER TRAINING SYSTEM	0.16	0.25	0.30	0.31	0.20	0.10	0.04	1.38
	2. TEACHER TRAINING AND UPGRADING	<u>0.03</u>	<u>0.06</u>	<u>0.13</u>	<u>0.22</u>	<u>0.22</u>	<u>0.22</u>	<u>0.24</u>	<u>1.12</u>
	Sub-Total TEACHER EDUCATION	0.19	0.31	0.43	0.53	0.42	0.22	0.28	2.50
B.	<u>EDUCATION DEVELOPMENT</u>								
	1. SCHOOL FACILITIES IMPROVEMENT	0.65	0.67	0.70	0.72	0.74	0.77	0.80	5.05
	2. CURRICULUM AND TEXTBOOK DEVELOPMENT	0.33	0.38	0.43	0.40	0.27	0.27	0.26	2.34
	3. ASSESSMENT AND EVALUATION	<u>0.05</u>	<u>0.07</u>	<u>0.07</u>	<u>0.05</u>	<u>0.04</u>	<u>0.04</u>	<u>0.04</u>	<u>0.36</u>
	Sub-Total EDUCATION DEVELOPMENT	1.03	1.12	1.20	1.17	1.05	1.08	1.10	7.75
C.	<u>PLANNING AND MANAGEMENT</u>								
	1. ESTABLISHING AN EDUCATION PLANNING UNIT	0.14	0.14	0.16	0.16	0.04	0.03	0.02	0.69
	2. ESTABLISHING NEW EDUCATION CENTERS	0.10	0.18	0.21	0.17	0.15	0.10	0.06	0.97
	3. ESTABLISHING A PROJECT IMPLEMENTATION UNIT	<u>0.16</u>	<u>0.11</u>	<u>0.10</u>	<u>0.09</u>	<u>0.09</u>	<u>0.09</u>	<u>0.09</u>	<u>0.73</u>
	Sub-Total PLANNING AND MANAGEMENT	0.40	0.43	0.47	0.42	0.28	0.22	0.17	2.39
	TOTAL PROJECT COSTS	<u>1.62</u>	<u>1.86</u>	<u>2.10</u>	<u>2.12</u>	<u>1.75</u>	<u>1.62</u>	<u>1.55</u>	<u>12.64</u>

NOTES: Subtotals may not add due to rounding. Costs include taxes and duties.

BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT

SUMMARY ACCOUNTS BY YEAR

Totals Including Contingencies
(US\$ Million)

	92	93	94	95	96	97	98	Total
I. INVESTMENT COSTS								
A. CIVIL WORKS	0.55	0.71	0.80	0.71	0.67	0.62	0.59	4.65
B. PROFESSIONAL FEES	0.05	0.07	0.08	0.07	0.06	0.06	0.05	0.44
C. FURNITURE	0.05	0.06	0.06	0.08	0.08	0.07	0.06	0.46
D. EQUIPMENT	0.11	0.13	0.14	0.20	0.18	0.13	0.11	1.00
E. VEHICLES	0.11	0.07	0.05	0.00	0.00	0.00	0.00	0.23
F. BOOKS	0.02	0.02	0.03	0.03	0.03	0.03	0.03	0.19
G. FOREIGN CONSULTANTS	0.30	0.29	0.33	0.34	0.08	0.05	0.03	1.42
H. FOREIGN FELLOWSHIPS	0.07	0.09	0.10	0.08	0.04	0.03	0.03	0.44
I. LOCAL CONSULTANTS	0.09	0.10	0.12	0.15	0.16	0.16	0.16	0.94
J. LOCAL FELLOWSHIPS	0.02	0.04	0.08	0.12	0.12	0.12	0.13	0.63
K. TEXTBOOKS	<u>0.15</u>	<u>0.15</u>	<u>0.16</u>	<u>0.16</u>	<u>0.17</u>	<u>0.18</u>	<u>0.18</u>	<u>1.15</u>
TOTAL INVESTMENT COSTS	1.51	1.73	1.94	1.94	1.59	1.45	1.36	11.55
II. RECURRENT COSTS								
A. PRESERVICE TRAINING ALLOWANCES	0.00	0.00	0.00	0.00	0.01	0.01	0.01	0.03
B. SALARIES OF ADDITIONAL STAFF	0.04	0.04	0.06	0.07	0.07	0.07	0.08	0.43
C. CONSUMABLE AND TRAINING MATERIALS	0.03	0.03	0.03	0.04	0.04	0.04	0.04	0.25
D. OPERATION AND MAINTENANCE	<u>0.03</u>	<u>0.05</u>	<u>0.06</u>	<u>0.06</u>	<u>0.06</u>	<u>0.06</u>	<u>0.06</u>	<u>0.38</u>
TOTAL RECURRENT COSTS	0.10	0.12	0.15	0.17	0.18	0.18	0.19	1.09
TOTAL PROJECT COSTS	<u>1.61</u>	<u>1.85</u>	<u>2.09</u>	<u>2.11</u>	<u>1.77</u>	<u>1.63</u>	<u>1.55</u>	<u>12.64</u>

NOTES: Subtotals may not add due to rounding. Costs include taxes and duties.

BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT
Financing Plan on Summary Accounts
(US\$ '000)

	INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPMENT		Overseas Development Administration		GOVERNMENT OF BELIZE		Total		Local (Excl. Taxes)	Duties & Taxes	
	Amount	%	Amount	%	Amount	%	Amount	%			
I. INVESTMENT COSTS											
A. CIVIL WORKS	2,794.3	60.0	-	-	1,862.9	40.0	4,657.1	36.8	2,017.0	2,546.2	93.1
B. PROFESSIONAL FEES	255.2	60.0	-	-	170.1	40.0	425.4	3.4	75.9	349.5	-
C. FURNITURE	281.6	60.0	-	-	187.7	40.0	469.4	3.7	146.3	309.0	14.1
D. EQUIPMENT	600.7	60.0	-	-	400.4	40.0	1,001.1	7.9	906.0	95.1	-
E. VEHICLES	137.6	60.0	-	-	91.7	40.0	229.3	1.8	207.0	22.3	-
F. BOOKS	194.0	100.0	-	-	-	-	194.0	1.5	156.9	37.1	-
G. FOREIGN CONSULTANTS	524.6	40.0	786.9	60.0	0.0	0.0	1,311.4	10.4	916.7	394.7	-
H. FOREIGN FELLOWSHIPS	53.2	10.0	478.9	90.0	0.0	0.0	532.1	4.2	478.5	53.6	-
I. LOCAL CONSULTANTS	560.9	60.0	-	-	373.9	40.0	934.8	7.4	-	934.8	-
J. LOCAL FELLOWSHIPS	379.6	60.0	-	-	253.0	40.0	632.6	5.0	-	632.6	-
K. TEXTBOOKS	689.8	60.0	-	-	459.9	40.0	1,149.7	9.1	929.6	220.0	-
Total INVESTMENT COSTS	6,471.4	56.1	1,265.8	11.0	3,799.7	32.9	11,536.9	91.3	5,834.7	5,594.9	107.2
II. RECURRENT COSTS											
A. PRESERVICE TRAINING ALLOWANCES	16.1	60.0	-	-	10.0	40.0	26.9	0.2	-	26.9	-
B. SALARIES OF ADDITIONAL STAFF	267.1	60.0	-	-	178.1	40.0	445.2	3.5	-	445.2	-
C. CONSUMABLE AND TRAINING MATERIALS	149.9	60.0	-	-	100.0	40.0	249.9	2.0	201.9	43.0	5.0
D. OPERATION AND MAINTENANCE	229.4	60.0	-	-	153.0	40.0	382.4	3.0	75.7	299.0	7.6
Total RECURRENT COSTS	662.6	60.0	-	-	441.8	40.0	1,104.4	8.7	277.6	814.1	12.6
Total Disbursement	7,134.0	56.4	1,265.8	10.0	4,241.5	33.6	12,641.3	100.0	6,112.4	6,409.1	119.9

BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT
Financing Plan by Project Components
(US\$ '000)

	INTERNATIONAL BANK FOR RECONSTRUCTION OVERSEAS DEVELOPMENT AND DEVELOPMENT Administration		GOVERNMENT OF BELIZE		Total		For. Exch.	Local (Excl. Taxes)	Duties & Taxes		
	Amount	%	Amount	%	Amount	%					
A. TEACHER EDUCATION											
1. STRENGTHENING THE TEACHER TRAINING SYSTEM	714,275.9	51.5	340,637.8	24.6	331,991.5	23.9	1,306,905.3	11.0	838,982.3	536,760.1	11,162.8
2. TEACHER TRAINING AND UPGRADING	678,368.7	80.7	-	-	439,397.6	39.3	1,117,766.3	8.8	31,115.5	1,086,267.1	383.8
Sub-Total TEACHER EDUCATION	1,392,644.6	55.6	340,637.8	13.6	771,389.1	30.8	2,504,671.6	19.8	870,097.8	1,623,027.2	11,546.6
B. EDUCATION DEVELOPMENT											
1. SCHOOL FACILITIES IMPROVEMENT	3,023,927.7	60.0	-	-	2,015,951.8	40.0	5,039,879.5	39.9	2,284,112.3	2,668,614.4	87,152.8
2. CURRICULUM AND TEXTBOOK DEVELOPMENT	1,250,699.2	56.1	249,642.5	11.2	730,798.2	32.0	2,231,139.8	17.6	1,499,666.9	724,973.2	6,499.7
3. ASSESSMENT AND EVALUATION	239,792.8	44.4	200,194.5	37.1	99,561.2	18.5	539,548.5	4.3	339,595.7	198,455.6	1,497.2
Sub-Total EDUCATION DEVELOPMENT	4,514,419.7	57.8	449,836.9	5.8	2,846,311.2	36.4	7,810,567.8	61.8	4,123,374.9	3,592,043.1	95,149.7
C. PLANNING AND MANAGEMENT											
1. PLANNING UNIT AND MANAGEMENT STRENGTHENING	235,643.7	37.0	340,220.8	54.6	53,472.0	8.4	637,336.6	5.0	428,566.7	208,334.2	435.6
2. ESTABLISHING NEW EDUCATION CENTERS	627,041.9	64.5	-	-	344,982.8	35.5	972,824.7	7.7	466,474.9	495,380.1	10,969.6
3. ESTABLISHING A PROJECT IMPLEMENTATION UNIT	363,481.4	50.8	127,076.2	17.8	225,329.3	31.5	715,006.9	5.7	223,844.5	490,275.3	1,767.2
Sub-Total PLANNING AND MANAGEMENT	1,226,967.1	52.7	475,297.0	20.4	623,784.1	26.8	2,326,048.2	18.4	1,118,886.1	1,193,989.6	13,172.5
Total Disbursement	7,134,031.4	56.4	1,265,771.8	10.0	4,241,484.5	33.6	12,641,287.6	100.0	6,112,358.8	6,409,059.9	119,868.8

BELIZE
PRIMARY EDUCATION DEVELOPMENT PROJECT
Summary Account by Project Component
(BZ\$ '000)

	TEACHER EDUCATION		EDUCATION DEVELOPMENT			PLANNING AND MANAGEMENT			Physical Contingencies		
	STRENGTHENING THE TEACHER TRAINING SYSTEM	TEACHER TRAINING AND UPGRADING	SCHOOL FACILITIES IMPROVEMENT	CURRICULUM AND TEXTBOOK DEVELOPMENT	ASSESSMENT AND EVALUATION	PLANNING UNIT AND MANAGEMENT STRENGTHENING	ESTABLISHING NEW EDUCATION CENTERS	ESTABLISHING A PROJECT IMPLEMENTATION UNIT	Total	% Amount	
I. INVESTMENT COSTS											
A. CIVIL WORKS	799.4	-	4,054.3	246.2	-	-	652.1	40.0	7,792.0	10.0	779.2
B. PROFESSIONAL FEES	79.9	-	404.3	36.6	-	-	78.2	6.0	685.0	10.0	68.5
C. FURNITURE	64.0	-	605.4	24.4	35.0	-	50.2	8.0	787.0	10.0	78.7
D. EQUIPMENT	320.0	-	903.1	97.7	139.0	33.0	80.3	50.0	1,628.1	10.0	162.8
E. VEHICLES	40.0	-	-	40.0	-	40.0	240.0	80.0	440.0	0.0	0.0
F. BOOKS	50.0	30.2	-	50.0	-	5.0	180.0	-	315.2	10.0	31.5
G. FOREIGN CONSULTANTS	780.0	-	-	520.0	360.0	600.0	-	40.0	2,320.0	5.0	116.0
H. FOREIGN FELLOWSHIPS	140.0	-	-	150.0	150.0	200.0	-	200.0	920.0	5.0	46.0
I. LOCAL CONSULTANTS	24.0	596.8	-	250.0	-	-	-	675.0	1,545.8	5.0	77.3
J. LOCAL FELLOWSHIPS	15.0	832.0	-	180.0	-	-	-	-	1,027.0	5.0	51.4
K. TEXTBOOKS	-	-	-	1,875.0	-	-	-	-	1,875.0	10.0	187.5
Total INVESTMENT COSTS	2,312.3	1,459.0	8,052.1	3,469.9	684.0	958.0	1,200.8	1,119.0	19,135.1	8.3	1,598.9
II. RECURRENT COSTS											
A. PRESERVICE TRAINING ALLOWANCES	-	43.4	-	-	-	-	-	-	43.4	5.0	2.2
B. SALARIES OF ADDITIONAL STAFF	-	274.5	-	-	165.0	120.0	175.0	-	734.5	5.0	36.7
C. CONSUMABLE AND TRAINING MATERIALS	-	31.0	-	250.0	70.0	10.0	25.0	20.0	406.0	10.0	40.6
D. OPERATION AND MAINTENANCE	50.0	-	200.0	12.5	-	25.0	165.0	75.0	607.5	10.0	60.8
Total RECURRENT COSTS	50.0	348.9	200.0	262.5	235.0	155.0	365.0	95.0	1,791.4	7.8	140.2
Total BASELINE COSTS	2,362.3	1,807.9	8,352.1	3,732.4	919.0	1,113.0	1,645.8	1,214.0	21,126.5	8.2	1,739.1
Physical Contingencies	104.3	93.5	833.2	314.2	58.2	57.3	131.8	66.7	1,739.1	0.0	0.0
Price Contingencies	227.2	334.1	914.4	415.6	101.9	104.4	160.0	151.1	2,416.9	7.5	181.4
Total PROJECT COSTS	2,773.8	2,235.5	10,079.8	4,462.3	1,079.1	1,274.7	1,945.6	1,431.8	25,282.6	7.6	1,920.5
Taxes	22.3	0.8	174.3	13.0	3.0	0.9	21.9	3.5	239.7	9.1	21.8
Foreign Exchange	1,678.0	62.2	4,568.2	2,999.3	679.2	857.1	932.9	447.7	12,224.7	7.8	952.9

BELIZE

PRIMARY EDUCATION DEVELOPMENT PROJECT

SELECTED DOCUMENTS AND DATA AVAILABLE IN THE PROJECT FILE

A. Selected Reports and Studies Related to the Sector

- A.1 Belize Education Act, the Congress of Belize, April 24, 1991.
- A.2 Belize Education Sector Review Report, Human Resources Division, Country Department III, Latin America and the Caribbean Regional Office, the World Bank, January 24, 1989.
- A.3 Education Plan 1990-1995 (Draft), Ministry of Education, Youth, Sports and Culture, Information & Broadcasting, Belmopan, June 1990.
- A.4 "Ethnic Minorities in Belize: Mopan, Kekchi, and Garifuna", Richard Wilk and Mac Chapin, Cultural Survival, September 1988.
- A.5 "Report on the Financing of Education in Belize", Perran Penrose, Ministry of Education, the Government of Belize, December 1990.

B. Selected Reports and Studies Related to the Project

- B.1 "Proposals for Examination Reform in Belize", George Bethell, Ministry of Education, the Government of Belize, December 1990.
- B.2 "The State of Government and Government Assisted Primary School Buildings in Belize in Spring 1992", Robin Ellison, Planning Unit, Ministry of Education, the Government of Belize, June 1991.

