Document of
The World Bank

Report No: 24782-JM

PROJECT APPRAISAL DOCUMENT

ON A

PROPOSED LOAN

IN THE AMOUNT OF US$39.8 MILLION

TO

JAMAICA

FOR THE

REFORM OF SECONDARY EDUCATION PROJECT II

September 16, 2002

Sector Management Unit for Human Development
Caribbean Country Management Unit
Latin America and Caribbean Region

CURRENCY EQUIVALENTS

(Exchange Rate Effective January 15, 2002)

Currency Unit = Jamaican Dollar (JMD)
1 JMD = US$0.02
US$1 = JMD 48.00

FISCAL YEAR
April 1 – March 31

ABBREVIATIONS AND ACRONYMS

CAS	Country Assistance Strategy
CFAS	Country Financial Accountability Assessment
CXC	Catibbean Examination Council
DFID	Department for International Development (UK)
GOJ	Government of Jamaica
GNAT	Grade Nine Achievement Test
GSAT	Grade Six Achievement Test
ICB	International Competitive Bidding
IDB	Inter-American Development Bank
IMF	International Monetary Fund
JHSC	Junior High School Certificate Examination
JAASP	Jamaican All-Age School Project (DFID)
MIS	Management Information System
MOEYC	Ministry of Education, Youth and Culture
MOFD	Ministry of Finance and Development
MOH	Ministry of Health
MLSS	Ministry of Labor and Social Security
NCB	National Competitive Bidding
NGO's	Non-Governmental Organizations
PCU	Project Coordination Unit
PIOJ	Planning Institute of Jamaica
P&JH	Primary and Junior High Schools
PMR	Project Management Report
ROSE	Reform of Secondary Education
SA	Special Account
SEP	Secondary Enhancement Programme
SIF	Social Investment Fund
SIG	School Improvement Grants
SIP	School Improvement Plan
SLC	Survey of Living Conditions
SOE	Statement of Expenditures
SSNP	Social Safety Net Project
USAID	United States Agency for International Development
UTECH	University of Technology
UWI	University of the West Indies

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JAMAICA
REFORM OF SECONDARY EDUCATION PROJECT II

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MAP(S)

JAMAICA
REFORM OF SECONDARY EDUCATION PROJECT II

Project Appraisal Document

Latin America and Caribbean Region
LCSHE

Date: September 16, 2002	**Team Leader:** Kin Bing Wu
Sector Manager/Director: Marito H. Garcia	**Sector(s):** Secondary education (100%)
Country Manager/Director: Orsalia Kalantzopoulos	**Theme(s):** Other public sector governance (P) , Education for all (P), Access to urban services for the poor (P), Rural services and infrastructure (P)
Project ID: P071589	
Lending Instrument: Specific Investment Loan (SIL)	

Project Financing Data

[X] Loan [ ] Credit [ ] Grant [ ] Guarantee [ ] Other:

For Loans/Credits/Others:
Loan Currency: United States Dollar
Amount (US$m): 39.8 million

Borrower Rationale for Choice of Loan Terms Available on File: ☐ **Yes**

Proposed Terms (IBRD): Fixed-Spread Loan (FSL)
Grace period (years): 5 **Years to maturity:** 17
Commitment fee: 0.85% 1st. 4 years/0.75% after **Front end fee (FEF) on Bank loan:** 1.00%

Initial choice of Interest-rate basis:

Type of repayment schedule:
[X] Fixed at Commitment, with the following repayment method (choose one):
[ ] Linked to Disbursement

Financing Plan (US$m): Source	Local	Foreign	Total
BORROWER	23.20	0.00	23.20
IBRD	21.76	18.04	39.80
Total:	44.96	18.04	63.00

Borrower: JAMAICA
Responsible agency: MINISTRY OF EDUCATION, YOUTH AND CULTURE
Address: 2 National Heroes Circle, Kingston 4
Contact Person: Ms. Marguerite Bowie, Permanent Secretary
Tel: (876) 922-1400 Fax: (876) 922-6328 Email: Edpersec@Cwjamaica.Com

Estimated Disbursements (Bank FY/US$m):

FY								
Annual	3.00	10.00	15.00	8.00	3.80			
Cumulative	3.00	13.00	28.00	36.00	39.80			

Project implementation period: January 1, 2003 - December 31, 2007
Expected effectiveness date: 01/01/2003 **Expected closing date:** 06/30/2008

A. Project Development Objective

1. Project development objective: (see Annex 1)

This Reform of Secondary Education Project II (ROSE II) (2003-2007), is a follow-on to the first project, ROSE I (1993-2000). These two projects support the Jamaican Ministry of Education, Youth and Culture's (MOEYC) 15-year program to reform secondary education.

ROSE II aims to achieve the following:

(a) to continue to improve the quality and equity of secondary education through funding school improvement plans and through providing pedagogical and other support to schools;

(b) to expand access to upper secondary education through building new schools and extending existing schools, and through public financing of student places in Independent Schools; and

(c) to strengthen the capacity of the central ministry and the regional offices to manage and monitor the reform.

2. Key performance indicators: (see Annex 1)

- Annual increase in average scores in Junior High School Certification Examination (JHSC) or the Grade Nine Assessment Test (GNAT) in Language Arts and Mathematics.
- Annual reduction in the percentage of students in JHSC scoring below 30 percent correct in Language Arts and Mathematics.
- Annual increase in attainment, at the end of Grade 11, in the Caribbean Examination Council's Caribbean Secondary Education Certificate Examination (CXC-CSEC) at Level 3 and above in Language and Mathematics.
- Annual increase in enrollment in secondary education, disaggregated by consumption quintile.
- Annual increase in participation in the CXC-CSEC at the end of Grade 11.

The aim is to obtain statistically significant improvement in the above indicators by the end of the Project in 2007, in comparison with the baseline measures in 2001. The participation rates and the results of the above-mentioned examinations are to be disaggregated by school type. The JHSC and CXC-CSEC results of students who receive bursaries in Independent Schools will be monitored.

B. Strategic Context

1. Sector-related Country Assistance Strategy (CAS) goal supported by the project: (see Annex 1)
Document number: R2000-200 **Date of latest CAS discussion:** November 30, 2000

Jamaica is a country of 2.6 million people and with a GNP per capita of under $2,740 in 2001.

Since the late 1990s, economic contraction, high unemployment rates, particularly among young people, and crime and violence have adversely affected society. The Government of Jamaica's (GOJ) development agenda aims at: (a) restoring economic growth, (b) protecting the poor and building up the social and human capital, (c) improving governance, efficiency, and effectiveness of the public sector, and (d) ensuring sustainable development.

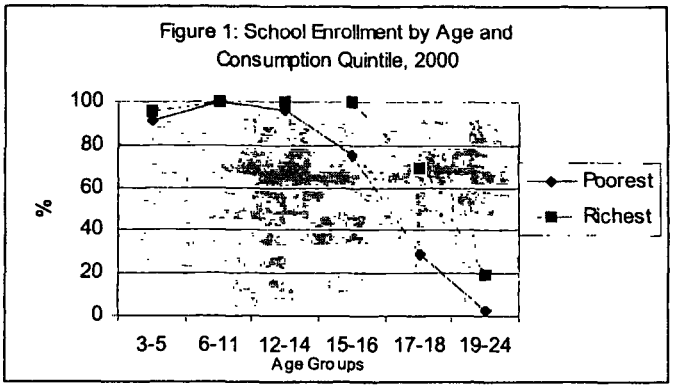
Based on this GOJ agenda, the Bank's Country Assistance Strategy (CAS) of November 2000 developed a highly focused program. The FY01-02 lending program supported reform of the financial sector, restructuring of the social safety net program, and instituting of a national program for HIV/AIDS prevention and control. In response to internal and external shocks in 2001, the Bank approved an Emergency Rehabilitation loan and prepared a National Community Development Project to address the issues of social dislocation. The CAS in 2002 follows the same course set previously. In the financial sector, it follows up with the Bank Restructuring and Management Program II. In the education sector, the CAS endorses GOJ's policy of improving the quality and equity of secondary education and of providing a place for all Grade Nine graduates in upper secondary education by 2007 through ROSE II because the Project speaks directly to the goals of ensuring the inclusiveness of growth and building up of the human capital.

2. Main sector issues and Government strategy:

Accomplishments. Jamaica stands out among lower middle income countries as one of the few that has attained 93 percent coverage for early childhood education for children between the ages of 3 and 5, and practically universal enrollment in primary and lower secondary education (Figure 1 and Table 1). The formal education system serves about 767,000 students at all levels, or about 30 percent of the total population. About 94 percent of the students are enrolled in the public secondary schools and 6 percent in independent schools.

These accomplishments reflect a successful focus of education policy, as well as a strong household demand for education. Government commitment to education is reflected in the growth in public expenditure on education from 2.9 to 7.6 percent of GDP between 1992/3 and 1999/2000. This level of public spending is high, relative to the Latin American and the Caribbean average of 4.6 percent, and also high relative to countries of similar income level.

The average household spending on primary and secondary education amounted to about US$624 per annum, indicating a willingness of households to pay for education. About a quarter of the Jamaican household expenditure on education is on extra-tutoring. The rest on lunch, transport, books and fees. Even the poorest consumption quintile spend something on extra-lessons, a most unusual phenomenon.



Issues. Challenges, however, are formidable. The key issues are (a) uneven quality of primary and secondary education; (b) youth-at-risk; (c) inadequate access to upper secondary education by the poor; (d) constraint in education finance; and (e) constraints in institutional capacity. (See Annex 11 for a description of the education system and education finance.)

Table 1: The Education System in Jamaica, 2000

Level	Enrollment in Public Institutions	Enrollment in Private Institutions	Gross Enrollment Ratio	Net Enrollment Ratio	Female as % of Total
ECE (Ages 3-5)	135,918	8,770	93	82	50
Primary (Ages 6-11)	312,369	33,000	~99.1	92.8	49
Secondary	277,540	1,500			51
Gr. 7-9 (Ages 12-14)	144,241	NA	~95.3	89	51
Gr. 10-11 (Ages 15-16)	78,112	NA	76.7	72	52
Gr. 12-13 (Ages 17-18)	5,177	NA	5.0	NA	62
Special Education**	2,414	NA	NA	NA	
Tertiary (Ages 17 up)**	38,822	2,000(?)	NA	NA	66

Sources: MOEYC School Census 2000; Jamaica Survey of Living Conditions 2000.

Notes:
(1) Gross enrollment ratios indicate how many students of all ages are studying at a given level, including under- and over-aged students, repeaters, and adult learners. Gross enrollment ratios may exceed 100 percent. Net enrollment ratios indicate what percentage of children of a particular age group are studying in the level designated for that age group. It never exceeds 100 percent and more accurately reflects the age-grade correspondence and the efficiency of the system.
(2) Enrollment in Grades 12 and 13 is not required for attending tertiary education institutions in Jamaica. Grades 12-13, which prepare for GCE A level exams, would give a competitive edge nationally and regionally in university admission.
(3) Tertiary education institutions include teachers' colleges, community colleges, and universities.
** Data for special education and tertiary education are from 1999/2000.

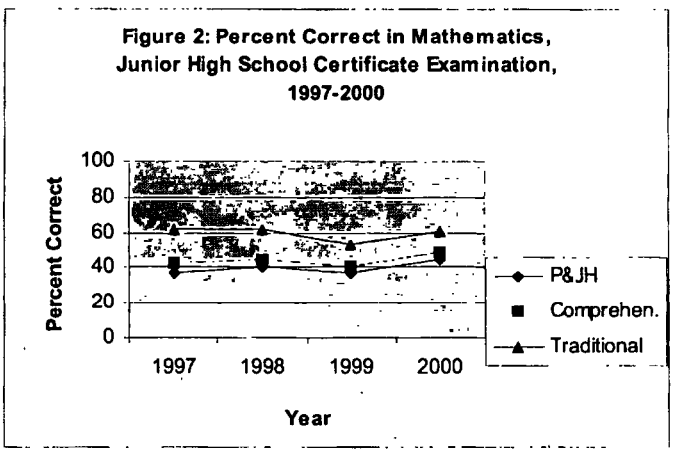
(a) Uneven quality of primary and secondary education

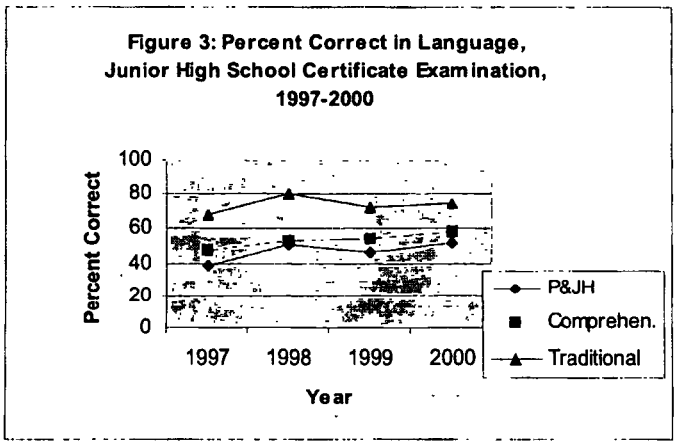
There is enormous disparity in students' mastery of basic cognitive skills:

At the end of the Primary Cycle (Grade 6): About 30 percent of Grade 6 leavers read below grade level. In spite of their low scores in the Grade Six Achievement Test (GSAT), they were placed nonetheless in Grade 7. They tend to lag further and further behind as they continue

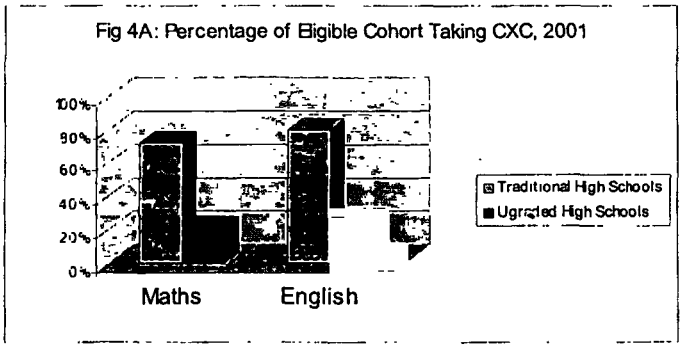
to move. Low academic achievement has a strong bearing on their subsequent educational aspirations, the risks of dropout and delinquent behavior.

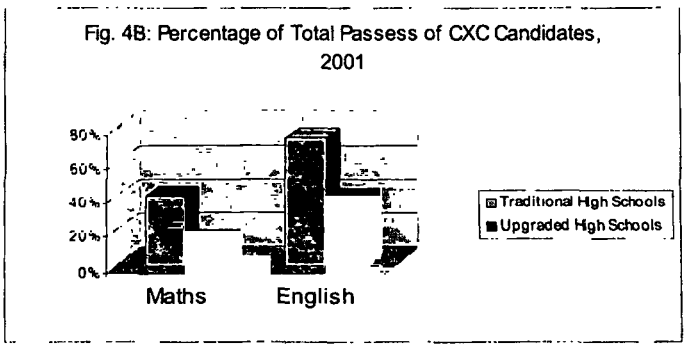
At the end of Lower Secondary Education (Grade 9): In the Junior High School Certificate Examination (JHSC) for the end of Grade 9 in 2000, students in the five-year Upgraded High Schools and three-year Primary and Junior Highs (P&JH) performed much worse than their counterparts in the Traditional High Schools in Language Arts and Mathematics (see Figures 2 and 3 for percent correct in mathematics and language in the JHSC Examination, 1997 to 2000).





At the end of Senior Secondary Education (Grade 11): Low achievement has led to low participating rates in the Caribbean Secondary Education Certificate Examination of the regional Caribbean Examination Council (CXC), which is the key examination for admission in tertiary education and employment. Of those students from Upgraded High Schools who sat the examination, only 31 percent attained the passing grade of Level 3 and above in Mathematics and 39 percent in English. Even among traditional High Schools, only 40 percent of those who sat the CXC attained a passing grade in Mathematics and 74 percent in English. The inadequate cognitive skills reduce students' work-preparedness and productivity, and the country's competitiveness in the global economy. (Figure 4A and 4B.)





Low level of achievement reflects an inevitable trade-off between quantity (enrollment expansion) and quality (maintenance of high standards). In the past, automatic promotion was practiced in order to minimize difficulties for over-aged students to stay in the same class with younger students and to accommodate a growing school-age population. Many students moved through the system without acquiring the requisite skills. Examinations are used to select the students with the highest achievement for the best and most well-financed schools. Soon the school system mirrored the socioeconomic divide of society.

Table 2 presents enrollment by school type and by consumption quintile. Students in the first (poorest) quintile were disproportionately represented in All-Age Schools. Over half of the students in the traditional High Schools were from the top two quintiles. In tertiary education, 77 percent of students were from the top quintile, but none were from the poorest quintile. (See Annex 11 for a description of the education system in Jamaica.)

Table 2: Enrollment by School Type in Secondary and Tertiary Education by Consumption Quintile, 2000

	Q1 (poorest)	Q2	Q3	Q4	Q5	Total
All-age (Gr. 7-9)	43%	30%	18%	6%	3%	100%
P&JH (Gr. 7-9)	22%	16%	19%	33%	10%	100%
Comprehensive (Gr. 7-11)	18%	24%	27%	18%	13%	100%
Secondary Highs (Gr. 7-13)	13%	17%	20%	25%	26%	100%
Technical Highs (Gr. 7-11/13)	11%	20%	15%	31%	23%	100%
Voc./Agricultural (Gr. 7-11)	11%	12%	39%	27%	11%	100%
Adult/Night	12%	0	14%	24%	51%	100%
Tertiary	0	2%	7%	14%	77%	100%

Source: Jamaica Survey of Living Conditions 2000.

(b) Youth-at-risk.

The students who are not in school after age 14 tend to be from the poorest quintile. (Figure 1). As they tend to be tracked into poorer quality schools, they easily lose interest in schooling all together and are at risk of falling into delinquent behavior and getting trapped into a cycle of poverty. Poor quality of school interacts with pre-existing disadvantaged home environment:

- Many of these students tend to come from unstable home environments. About 43 percent of households are female headed, almost one-fifth of children do not live with either parent. Many fathers are in the home irregularly, have multiple mates and children with more than one mate (Blank, 2000).

- Many of these students have been witnesses or subjects of violence at home or in the street. Grief, frustration, and anger are common experiences. These are emotions difficult enough for adults to cope with, let alone children or adolescents in their formative years. These experiences, while hard to measure, undoubtedly affect schooling and achievement in negative ways.

- Internalization of violence often begets violence. Over half of all major crimes are committed by youth and 30 percent of inmates sentenced to adult correctional facilities are between the ages of 17 and 24 (Blank, 2000). In 2001, there were about 1,139 homicides, averaging 3.5 per day (Ministry of National Security). This represents an increase of some 252 over 2000. About 28 percent of the homicides are due to domestic violence. Although the causes are complex, starting to work with youths in school would be a far more effective intervention than to tackle the issues at the later stage.

- Unstable adult relationships provide poor behavioral models for children. Many boys begin to have their first sexual experience at age 13 and girls at age 14. Teenage pregnancy is increasing and the number of reported new HIV infections has doubled since 1995 (World Bank's HIV/AIDS Project Appraisal Document, December 2001).

- Poor cognitive skills lead to poor labor market outcomes. Some 45 percent of the 14-19 age cohort and 28 percent of the 20-24 age group are unemployed (Labor Force Survey, 2000).

A multi-prong approach is needed to address the youth at risk issues. From the education sector, major efforts are needed to improve learning outcomes at all levels, to attend to students' emotional needs, to make the educational experience exciting and supportive so that students remain in school, and to provide a place in upper secondary education for all Grade 9 completers so as to reduce their exposure to greater risks outside the school.

(c) Inadequate access to upper secondary education by the poor.

The sharp decline in enrollment of students from the first quintile after age 14 can also be attributable to the lack of school places in Grades 10 and 11. For many students in All-Age and P&JH schools, which offer only 3 years of junior secondary education, there is little opportunity to continue on with senior secondary education. These schools tend to concentrate in rural areas which have difficulty recruiting qualified teachers in the first place and where the dispersion of population makes building upper secondary schools extremely costly.

Table 3 shows that the population which is not in school disproportionately has fewer academic qualifications which are essential to get a job in the private and public sectors in Jamaican society. To universalize upper secondary education would directly benefit these socioeconomically disadvantaged students. To provide opportunity to obtain upper secondary education is to give an opportunity to students from poor families to access tertiary education.

Table 3: Highest Examination Passed by Population 14 years and older not enrolled in Education institution, 2000

	Q1 poorest	Q2	Q3	Q4	Q5	Total
None	20%	21%	22%	22%	16%	100%
CXC Basic	8%	12%	17%	32%	31%	100%
CXC General 1-2 Subjects	7%	12%	22%	24%	35%	100%
CXC General 3-4 Subjects	5%	12%	16%	27%	39%	100%
CXC General 5+ & 1-2 A Level	0%	10%	3%	28%	59%	100%
GCE A Level 3+	0%	0%	10%	0%	90%	100%
Degree	2%	2%	3%	9%	83%	100%
Other	3%	5%	6%	10%	76%	100%
Note Stated	2%	9%	15%	33%	41%	100%

Source: Survey of Living Conditions, 2000.

(d) Constraints in education finance (See Annex 11)

Although GOJ has made education a top priority, the high level of public debt has put enormous pressure on education expenditure. Between 1992 and 2001, the government allocated an annual average of 11.5 percent of its national budget to the education sector, ranging from a low of 9.1 percent in 1994/95 to a high of 14.5 percent in 1997/98. The allocation without debt servicing averaged 22.7 percent over the same period. External funding accounted for an additional 7 to 10 percent of total public expenditure on education.

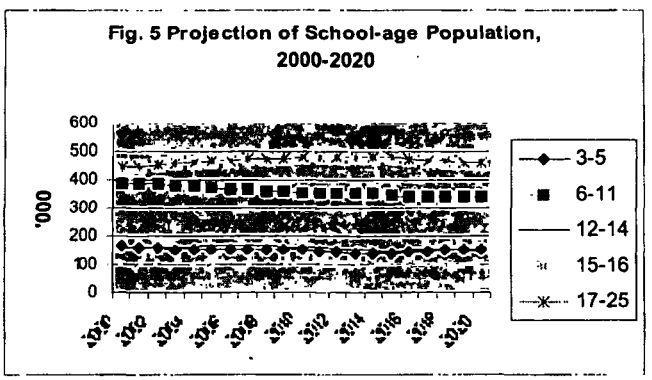
To defray the operating costs at the school level, the government introduced cost sharing in high schools in 1993/4. Tuition fees are regulated by the MOEYC, and are higher in traditional High Schools than upgraded High Schools. Fees are not chargeable in primary schools, All-Age, and P&JH schools. Textbooks are provided free of charge to primary schools. A textbook rental scheme is put in place to

provide books at the secondary level. To ensure that no student will be disadvantaged because of the lack of financial resources, a scheme of student financial assistance to cover tuition fees and textbook rental is put in place. Nonetheless, schools have little discretionary resources to improve their conditions and to address the challenges of teaching and learning. The regional offices also have little discretionary resources to help the schools.

(e) Constraints in institutional capacity

Over the years, the central ministry has strengthened its capacity in many aspects, including reform management, curriculum development, textbook development, student assessment, evaluation, education management information system, policy analysis, civil works supervision and project accounting. The development of these capacities has been largely financed by ROSE I. However, with expanded mandate, decentralization, and implementation of school-based management and accountability, the institutional capacity needs to be broadened and deepened. Training and qualification upgrading in core managerial and professional skills (such as policy and planning, information and communication technology, guidance and counseling, and project management) are needed. Improvement of information and communication technology is also needed to enhance management effectiveness. Moreover, since nearly 40 percent of senior and middle-level officers in the MOEYC will reach the retirement age of 60 within the next three years, the program of professional development for the next generation of officers should be accelerated. At the school level, technical assistance and capacity building is also needed in order to enhance accountability.

Summary and outlook. These challenges are formidable. However, the population trend also provides a window for improving the system in this and the next decades. (See Figure 5 below). The total fertility rate is trending down (in spite of rising teenage pregnancy) and the number of children in the age-group of 3 to 5 is projected to go into decline by 2006, to be followed closely by the age group of 6 to 11. The cohort for secondary education will see an increase throughout the first decade of the 21st century and then go into a decline. The eventual reduction in the school-age population would relieve pressure on public resources, and make universalization of access to upper secondary education and improvement of quality more attainable. Within the current decade, however, the age group of 12 to 16 will continue to increase modestly, thereby requiring additional places throughout the secondary school system.



Government Policy on the Education Sector

The MOEYC addressed the challenges of uneven quality and inequality by introducing a common core curriculum to reform junior secondary education nationwide since the early 1990's (in ROSE I).

This aimed to equalize the educational opportunity across a multiple track system and to balance between the demand for academic development and preparation for the world of work. Through five core subjects (Mathematics, Language Arts, Science, Social Studies, and Resource and Technology) and career education, the ROSE curriculum aimed to develop an effective level of oral and written communication skills, numeracy and problem-solving skills, critical and creative thinking, the ability to work collaboratively in groups, an appreciation of learning, and the ability to make decisions about careers linked to their interests and skills. New forms of student assessment were introduced in Grades 1, 3, 4, 6, and 9 in order to provide more valid and reliable measures of performance for diagnosis, placement and/or certification purposes. School types were reduced from seven to three through upgrading. The foundation of the reform was built

The Government's *White Paper: Education the Way Upward,* published in February 2001 after two years of broad public consultation, took the reform process further. Recognizing that schools must serve the needs of a diversified student body in an era of globalization and technological change, the White Paper emphasizes quality education for all and life-long learning.

The White Paper calls for meeting the challenges head on by early intervention from birth (see Critical Minimum Targets in Box 1). Meeting the targets of one level will impact on the next. Universalizing early childhood care and education is likely to compensate for a disadvantaged home environment and poverty, and improve the school readiness of children in primary education. Raising literacy achievement by the end of primary schooling would positively impact student performance in secondary education, reduce dropout, mitigate the youth-at-risk problems, and enhancing the pass rates in the CXC. This, in turn, would increase the demand for tertiary education. It is the White Paper's attention to physical facilities that aims to make the school attractive for all children and to provide connectivity to the outside world. Its emphasis on performance and information stresses results and strengthens accountability.

The White Paper also spells out the Government's policy with respect to education finance, textbook provision, educational standards, decentralization and school-based management, incentives and accountability which are critical to achieving these targets.

Education finance. The White Paper commits the Government to protect the annual allocation to education at least 15 percent of the recurrent National Budget. Recognition of resource constraints sets the stage for using a different approach to maximize the cost effectiveness of public finance, such as the ones supported by ROSE II.

Textbook provision. The MOEYC provides free textbooks at the primary level and operates a National Textbook Rental Scheme at the secondary level which all students can access. This has been in operation for a number of years. However, the problem is not the availability of financing for those unable to afford books, but the take–up rates. Nearly 50 percent of students in Grades 7 to 9 not rent the Foundation books in core subjects produced for those reading below grade level in junior secondary education. In addition, there appears to be a significant problem with the timely and sufficient supply of books to schools. ROSE II supports the provision of free foundation books to all students in All-Age and P&JH Schools.

Box 1: White Paper: Education the Way Upward

Critical minimum targets

Early childhood care, education and development

- Islandwide public education program by August 2001 in support of Early Childhood Care and Early Stimulation for children between birth and age 4.
- Full enrolment of early childhood age cohort ages 4 and 5 by the year 2003.

Primary education:

- Ninety percent average daily attendance by 2005 at the Primary Level (up from the current 70 percent on average).
- Teacher/student ratio in the Primary Schools to be standardized at 1:35 by the year 2003 (in comparison to the current range of 1:29 in All-age Primary department to 1:38 in Primary and Junior High Schools). By 2005, Grades 1 and 2 to have more than 30 students to a teacher.
- Eighty percent of all Grade 6 completers to demonstrate full literacy by 2003 (in contrast to the current 70%).

Secondary education:

- Five years of secondary education for all students entering Grade 7 in the year 2003 and thereafter.
- Five percent annual improvement in the number of students passing English and Mathematics in the Secondary Examination Certificate (CXC) in relation to the total Grade 11 sitting.
- The introduction of a High School Equivalency scheme by the year 2003.

Tertiary education:

- Fifteen percent enrolment rate in tertiary education by 2005 agreed by CARICOM Heads.

***Physical facilities*:**

- All schools to be at a satisfactory level of physical infrastructure by the year 2010; and
- To increase the provision of basic infrastructure (i.e. desks and chairs, etc.,) to meet the needs of enrolled students and teachers by 2003.
- Minimum of one computer per primary school, linked to internet or otherwise provided with Encyclopaedia and other learning software by December 31, 2001.

Performance and Information:

- Each school will have specific targets and will be assessed against these targets annually.
- Census data for all institutions to be collated and available by December 31 each year for the school year.

Education standards. To address past deficiency, effective in 2000, automatic promotion of students in the primary schools is not allowed beyond the grade 4 level. Remediation in reading has been put in place to ensure that students in grades 5 and 6 are reading at an appropriate level. Principals and teachers are required to prepare, provide and use the school data for institutional performance management and to facilitate national policy development, planning and operations. The MOEYC has developed Standards for Primary Education which encompass input, output, process, content and context standards. There is also a process of evaluating these standards. Standards for secondary education are also being developed.

Decentralization, participation and school based management. The MOEYC devolved the responsibilities for supervision, school maintenance and a very small aspect of media services, and approval of teachers appointment to six regional offices. This has resulted in a much closer relationship with the schools and local communities. Since the mid-1990s, an additional step has been taken to encourage school based management. Each primary and All-Age school is required to formulate and to operate a development plan, in which annual targets are set. Approved fund-raising is encouraged only in relation to the achievement of specific educational targets for which the Board and the institution take full responsibility. This is expected to increase ownership, improve accountability, and improve teachers and student performance. However, schools' planning is uneven and in most cases slightly unreal since no additional resources from the Ministry have flowed to enable schools to implement their plans.

Performance-orientation and public accountability. Institutional contracts are to be introduced to establish the charter of service to its clients and constituencies. Examples are contracts between the MOEYC to other institutions, administrators and staff, parents, students, members of Parliament, teachers' organizations, the general public and the media; and contracts between the schools and its parents, teachers and students. The White Paper affirms that the right of parents to access information about student performance and the responsibility of the school to provide such information. Effective in 2003, the MOEYC will publish relevant information about school performance based on the national standards set for each category of school.

Rationalization of junior secondary education in All-Age Schools. Although the White Paper did not cover this topic, there is a plan to redistribute students in Grades 7 to 9 in small All-Age Schools to other schools and to convert these schools to primary schools or primary and junior high schools. Currently, the 353 All-Age Schools enroll less than 8 percent of junior secondary school students in Jamaica and only 24 of them have an enrollment in Grades 7 to 9 that exceeds 100 students. This measure would make better sense in terms of providing junior secondary education in a more cost effective manner.

In summary, the White Paper provides an enabling policy environment for action. The Bank fully supports these policies as the basis for ROSE II.

3. Sector issues to be addressed by the project and strategic choices:

ROSE II addresses the issues of uneven quality of secondary education, youths at risk and the lack of discretionary funds at the school level for improvement, through providing grants to the schools based on their action plans (Component I) and provision of pedagogical and other support from the Central Ministry to the schools (Component 2). The project responds to the challenge of inadequate access of the poor to upper secondary education through (i) building three new schools and extending three existing schools to serve communities that have a growing secondary school age population, and (ii) through public bursaries to places in participating Independent Schools (Component 3). The project addresses the capacity issue through institutional strengthening (Component 4).

These strategic choices in the design of ROSE II are made not only in response to the issues in the sector but also by building from the foundation of ROSE I. The previous project succeeded in extending the core curriculum in junior secondary education from 11 pilot schools to all schools offering secondary education nationwide. It provided training on ROSE methodology to some 7,700 existing teachers, over 600 school administrators and 75 education officers, and 1,500 school board members, 380 teacher educators, and 2,500 pre-service teachers,, and developed distance learning materials. It made available textbooks and teachers guides to all schools offering secondary education and piloted programs for

improving upper secondary education. The project also built one new schools, refurbished 25 schools, and extended and refurbished 27 schools. It rationalized the examination system, introduced the Junior High School Certificate Examination (JHSCE), and developed an evaluation system to assess student performance. The reform was institutionalized through the establishment of the Reform Management Team and the integration of project activities into all relevant MOEYC functions. The project also improved the capacity for social policy analysis, for example, through financing the data collection and analysis of the Survey of Living Conditions.

Notwithstanding these acheivements, ROSE methology has not been fully integrated in school-level practices and student achievement remain low. The reasons include the following:

- The lack of parallel improvements in socioeconomic factors mentioned above -- poverty, lack of role model, lack of parental support or book rental, and guidance in homework.

- Deficiencies in primary education – many primary school leavers simply have not mastered the requisite skills to succeed in secondary education.

- School-related factors in secondary education -- insufficient systematic organization of compensatory education to help the low achievers, insufficient autonomy and discretionary resources, to address school problems. Without autonomy and resources, there cannot be accountability for meeting standards.

- Some weaknesses in the design of ROSE I such as (a) over-dependence on centrally-driven inputs and insufficient attention to school ownership of the reform; (b) failure to implement the reading improvement sub-component; (c) insufficient focus on student achievement as a key outcome of the project; and (d) one-shot teacher training, and training that focused on methodological issues rather than subject content.

ROSE II aims to deepen the reform in three aspects:

- focused attention to the students who are not performing in the basic cognitive skills, especially in reading and mathematics and who may be at risk;

- a demand-driven and school based approach to improving results on the ground.; and

- tighter implementation with performance indicators, increased local ownership and a greater degree of accountability.

International experience has borne out that interventions designed at the school level to meet specific needs of students will improve the quality of educational outputs and outcomes, as well as the cost-effectiveness of public finance because participation will increase ownership and accountability. Integral to the success of ROSE II will be the need for the successful implementation of an instructional supervision/management program managed by the MOEYC with major inputs from school administrators.

C. Project Description Summary

1. Project components (see Annex 2 for a detailed description and Annex 3 for a detailed cost breakdown):

The proposed cost of the project is estimated to be US$63.0 million over a five-year period from 2003 to 2007. The World Bank will finance US$39.8 million, and the GOJ US$23.2 million. The components and financial arrangements of the World Bank loan are as follows:

Component 1. School Improvement Grants

To ensure that ROSE II produce results on the ground and ensure success for all students, the ROSE program will need to be fully and deeply integrated into school practice. This entails that interventions must be designed to meet needs identified by the schools themselves. The Project will support schools to develop School Improvement Plans, based on their identification of their needs, and provide resources to meet these needs. Plans must seek to improve student outcomes (attendance, retention and achievement). Particular attention will be paid to how schools tackle weak basic skills (reading, writing and mathematics) and signs of student disaffection (non-attendance, tardiness, behavioral issues, etc). Schools are best-placed to identify strategies to tackle their needs, so few restrictions, beyond a prohibition against major civil works, will be placed on schools. To support students taking charge of their own affairs and designing programs to address their needs, part of the grant will be set aside if requested by individual schools in their SIP, to fund activities designed and managed by students.

The loan will provide grants to all upgraded High Schools and Agricultural/Vocational Schools, and to Primary and Junior Highs and All-Age schools with large enrollments of lower secondary students which have not benefited from other similar projects (funded by GOJ, or by other external agencies).

Eligible activities for funding by this component would include: Curricular and co-curricular activities to make learning exciting, to entice students to attend school daily, to build character, and to provide community services; remedial education conducted after-school, during the weekends, holidays, and the summer to bring all students up to the same level and to make up for days lost due to weather or social unrest; building up the library, instructional materials, and educational facilities in school; de-tracking of students within the same school; parenting education/community outreach to ensure consistent and comprehensive support to students; teacher professional development to deepen subject matter knowledge and to update pedagogical practices, to keep abreast of professional trend in education and counseling related areas (including workshops, national and international conferences); partnership/twining with other schools in Jamaica or in another country to share good practice and develop joint teacher and student activities; management training for principals and senior staff, especially in the use and analysis of student performance data and in financial planning and; refurbishment to make the school more functional, safe, and attractive.

There is considerable experience at the primary level in Jamaica with various models of school improvement planning. There is limited experience at the secondary level (MOEYC's Secondary Enhancement Program which started in 2001/02 financial year and HEART Trust/NTA's project with 14 technical high schools) This project will build on these experiences and seek to harmonize the procedures to ensure transparency and clarity for schools.

Regional Review Panels will be established in each region, chaired by the Regional Director and to include Regional Education Officers (Secondary Education), Regional Financial Controller, a ROSE II Education Officer, principals from schools in other regions, and co-opted experts (such as those from the teacher training colleges). Panels will be responsible for judging that the School Improvement Plans (SIPs) are realistic, cost-effective and targeted.

Schools will receive an allocation to support the implementation of their SIP based on the number of pupils in their school that have low achievement (based on the GSAT) subject to a minimum allocation for all schools. This will make sure the funds are targeted to those schools with the most critical needs.

Sub-Component 1.1: Preparation of School Improvement Plans

This subcomponent will fund the following:

- Training in school improvement planning for Regional Education Officers, principals, teachers, education officers and school community representatives;
- Technical assistance for the development of a School Improvement Plan Manual and training materials;
- Printing of School Improvement Plan Manuals and training materials.

Sub-Component 1. 2: Implementation of School Improvement Plans

This sub-component will provide funding directly to schools, once their School Improvement Plans have been approved by the Regional Review Panel. Schools will receive funding for the implementation of the first year of their School Development Plans in two tranches. Approval of satisfactory progress and an updated SIP for each subsequent year will be necessary for further funds to flow.

Component 2. Reform Support from the Central Ministry to the schools

Financing of school-based initiatives for improvement alone is not sufficient for the transformation of schools. Centrally coordinated initiatives are needed to complement the bottom up approach. The central ministry will play the role of a standard bearer by rallying schools around national programs on literacy and mathematics, by providing the tools for teachers to diagnose the specific learning problems and guidance to help them, enriching libraries and media centers, and supporting counseling for at-risk youths. The sub-components are as follows:

Sub-Component 2.1: Literacy and Mathematics Enhancement

This sub-component will fund the following:

- Technical assistance to develop an effective methodology and supporting materials to bring students' reading and mastery of mathematics up to grade level so that they can learn the content of other subjects as well as learn on their own; and technical assistance to develop a strategy to implement this across all secondary schools. This methodology, materials, and strategy will be designed in line with the textbooks developed under Secondary Textbook Project (GOJ/DFID) and used in ROSE I, and coordinated with other agencies, such as DFID, IDB and USAID, who fund projects which include literacy programs in All-Age schools.

- Technical assistance in the design of diagnostic tools of student learning problems in specific content areas and support package for teachers. The project will support technical assistance to develop valid and reliable diagnostic tools and support packages to guide teachers to address

learning problems in specific content areas. This will focus Grades 7, 8 and 9 so that interventions can be organized early on to ensure that every student will master the skills at grade level. The support package includes teachers guide on how to correct common misconceptions and mistakes in core subject areas; and

- In-service training organized around these tools and packages within the schools. This will be organized by the MOEYC working in conjunction with the Teachers Colleges.

Sub-Component 2.2: Strengthening Teaching, Guidance and Student Participation

This sub-component will fund the following:

- Provision of free foundation books to all students in All-Age and Primary and Junior High Schools;

- Provision of instructional and related inputs to schools, including literacy and mathematics materials, textbooks, library materials and curriculum and teacher's guides;

- Improve library and media resource centers in schools to support the literacy and mathematics enhancement programs and to develop the skills for life-long learning;

- In-service training in curriculum implementation for teachers, education officers and teacher trainers, and training to strengthen guidance and counseling methods.

Component 3. Expand access to upper secondary education

The 1999/2000 census data revealed that approximately 11,700 Grade 9 graduates did not have access to a place at Grade 10. The vast majority of these are students from poor families. Thus, expanding access is essential to meet the equity objective, to alleviate poverty, and to address youth-at-risk issues. However, due to reduced total fertility rates and the projected decline of the school-age population starting from the end of this decade, these places will be provided through a range of options to allow for greater flexibility and cost-effectiveness.

Although Enrollment in Independent Secondary Schools accounts for 6 percent of the total, and many of these schools have excess capacity as the economic stagnation has made it difficult for families to keep their children in private schools. Such excess capacity can be utilized to provide immediate access.

Sub-Component 3. 1: Renovation and construction of new schools

- Construction of three new schools and extension of three existing schools where the density and stability of the relevant school-age population justify;

- Technical assistance for the design and pre- and post-contract supervision of civil works for new and extended schools;

- Support for the operation and maintenance of new and extended schools;

- Staffing (including teaching, managerial and support staff for new and extended schools).

Sub-Component 3.2: Bursaries to participating Independent Schools to expand access

Provision of bursaries to participating Independent Schools to give upper secondary access to approximately 1,300 students, in accordance with the terms specified in the Loan Agreement and the Operational Manual for the project.

Component 4. Institutional strengthening.

To implement the above components successfully, the Ministry and the Regional Offices will need to take on a significantly different role by shifting from an institution that focuses on the development, acquisition and provision of inputs to schools to one that responds to school-based demands for technical assistance and continuous support. The strengthening of this new role is key to the successful implementation of ROSE II. A similar but small activity has begun under the DFID supported Jamaica All-Age Schools Project. The sub-components are as follows:

Sub-Component 4.1: Management Information System

- Use of technology to improve management efficiency: Development of a secondary school management information system and use of imaging systems and digital cameras to improve documentation of procurement of civil works, goods and services;
- Training in the use of the MIS and related inputs; and
- Provision of computer systems to schools and regional offices so that they can utilize the new MIS system and funding for the operation and maintenance of these computer systems.

Sub-Component 4. 2: Enhancing Efficiency And Effectiveness

- Institutional strengthening of MOEYC and Regional Offices through fellowships, study tours and attendance at international conferences for professional development of education officers;
- Provision of computer and other equipment to selected divisions within in the Ministry and support for the operation and maintenance of this equipment;
- Provision of equipment and materials to enhance the libraries and/or learning resource centers and/or science labs of teachers colleges and the regional offices' resource rooms.

Sub-Component 4.3. Maintaining and fully utilizing assessment, monitoring and evaluation capacity.

This Component will provide support to continue the efforts to enhance the student assessment unit. It will strengthen test development capacity by providing opportunities for education officers to upgrade their skills in line with current best practices; standardize test development processes across testing programs by training several officers in each aspect of test development, administration, analysis, and data storage and retrieval. This Sub-component will also provide support for implementation of the Junior High School Certificate Examination that was designed with assistance from the ROSE I project. The JHSCE will provide diagnostic information on students and baseline and evaluation data on schools.

Table 4: Project Components

Component	Indicative Costs (US$M)	% of Total	Bank-financing (US$M)	% of Bank-financing
1. School Improvement Grant to raise achievement of all students	11.00	17.5	10.00	25.1
2. Reform support from the Central Ministry to the schools	11.77	18.7	9.00	22.6
3. Expand access to upper secondary education	28.00	44.4	16.00	40.2
4. Institutional strengthening	9.12	14.5	4.30	10.8
5. Project Implementation Unit	2.71	4.3	0.10	0.3
Total Project Costs	62.60	99.4	39.40	99.0
Front-end fee	0.40	0.6	0.40	1.0
Total Financing Required	63.00	100.0	39.80	100.0

2. Key policy and institutional reforms supported by the project:

Two areas of institutional reforms are sought:

School Improvement Grants

Decentralization has been a GOJ policy since the 1990s. School improvement planning in primary schools has been in practice in Jamaica since the late 1980s. In the late 1990s, it was introduced to Technical High Schools, which were funded by the HEART Trust. In 2001, MOEYC allocated J$200 million to directly fund 21 schools in the Secondary Enhancement Program. Externally financed projects such as DFID' Jamaica All-Age School Project funds 72 All-Age Schools and USAID's New Horizon funds 48 All-Age schools. The IDB's Primary Education Support Project provides a small grant to 27 primary schools. However, the majority of All-Age, Primary and Junior Highs, and Upgraded High Schools, have not received direct financial resources to enable them to implement their school improvement plans.

The major innovation in ROSE II is requirement by schools to develop a three year (as opposed to one year) school plan; which would be financed subject to annual reviews. In this way, longer-term planning will be encouraged which will enable schools to see improvement in student learning and will move away from the tendency to think about using injections of money for civil works only. In addition, accountability for school performance will be enhanced through the annual review process; and those schools who are successful in reaching their targets will be rewarded. By financing school-based initiatives, the project would potentially change the way central ministry, regional offices and schools have been operating and might have long term implications on the way public resources are allocated to schools, if it proves to be effective. Since schools have already been charging fees to defray their operating costs, with additional resources from the project they could make better and more effective use of their own resources through a matching mechanism.

Bursaries for Independent School Places

The aims are: (a) to allow immediate access without waiting for new schools to be built; (b) to provide greater flexibility in supply of school places in view of internal migration of population and longer term decline of the school-age population; and (c) to improve cost-efficiency and effectiveness of

the provision of educational services. If there is sufficiently strong supply response, the government can use this mechanism to expand access, without committing too much of the scarce public resources in the fixed costs of construction and in recurrent cost of repair and maintenance and of salaries and pensions. Pending the results of the first year of implementation, students in Grades 7-9 in All-Age and Primary and Junior High Schools can be placed in private, Independent Schools.

3. Benefits and target population:

Different components and subcomponents target different beneficiaries. Table 6 provides a summary.

Table 5: A Summary of the Number of Students Benefiting from the Project by Component

1. School Improvement Grants	174,477 secondary level students in urban and rural schools
2. Reform support	222,363 secondary level students in the 594 schools that offer some form of secondary education
3. Expand Access	2,700 students in new schools 1,335 students in extended schools 1,309 students who receive subsidized places in private schools (Half of these students are likely to have to repeat Grade 9 due to their lower JHSC achievement. They will be provided with subsidized places for 3 years instead of 2 to complete senior secondary education).
4. Institutional strengthening	160 secondary schools that will receive the management information system, 6 regional offices and 6 teachers colleges that will receive resources to upgrade their libraries.

In addition to the students who will benefit from the project, 24 panel members and at least 792 school representatives will be trained in School Improvement Planning; and 240 teachers and counselors and 6 college lecturers will receive training in enhanced reading and mathematics methodology and counseling. Six Education Officers will be trained at the Master's level and 22 Education Officers and 14 college lecturers will be supported to take short courses, study tours and international conferences.

Given the short-term bulge of the secondary school-age population and the continuous trend of rural to urban migration, it is estimated that a small number of additional places in junior secondary education would be needed. The new schools to be built therefore are High Schools with 5 years of education.

4. Institutional and implementation arrangements:

Implementation Period: 5 years

Project implementation for ROSE II will modify the structure under ROSE I. The matrix structure of management (staffing and reporting relationship for the ROSE Secretariat are shown in the Proposed Operational Structure for ROSE II in Annex 17.

(a) The Reform Management Committee

The Reform Management Committee chaired by the Permanent Secretary will make policies and key decisions for the Project. The Committee comprises Division Directors and Unit Heads in the central ministry (Planning and Development, Core Curriculum, Professional Development, Student Assessment, Programme Monitoring and Evaluation, Guidance and Counseling, Media Services, Technical Services, and Technical and Vocational Education) and representatives of Regional Offices. The Units mentioned above will implement various components of the project as part of their daily operation activities. Officers in six regional offices have equivalent counterparts to implement the policies and directives. Where services are not provided by the Ministry, such as construction, firms will be contracted. The relevant unit within the Ministry will plan and exercise oversight and monitoring.

(b) Division of Technical Services and Project Management

This division will oversee the Project to ensure compliance of financial and procurement guidelines of all externally funded projects, and represent the Project to other Ministries, including the Project Analysis and Monitoring Coordination Unit of the Ministry of Finance. The Director of Projects will report to the Director of the Division of Project Management and Technical Services.

(c) Project Coordination Unit (PCU or ROSE Secretariat)

The PCU or ROSE Secretariat will assume core project management and support functions. The Project Manager will report to the Director of Projects and coordinate four functions:

- Education function – 2 education officers (one for school improvement plans; and one for Literacy and Numeracy Enhancement);
- Administrative functions – an administrator, a training coordinator, a procurement officer, a secretary, and a driver;
- Financial management function – 2 accountants and a accounting clerk;
- Technical services (civil works) – a technical coordinator and 6 clerks of works.

Collectively, the PCU will have the following responsibilities:

i. coordinate with various units and the regional offices;
ii. promote the project in regions and parishes;
iii. maintain project records and prepare bi-annual progress reports;
iv. prepare terms of reference for consultants and supervise their work;
v. ensure compliance with the operation manual;
vi. ensure compliance with Bank procurement guidelines;
vii. undertake the financial management of the project and ensure the auditing of project accounts;
viii.o perate a management information system to track process, inputs, outputs and outcomes; and
ix. coordinate Bank missions and carry out the mid-term review and end-of-project review.

(d) A Review Panel at each of the Regional Offices

The introduction of funding for school improvement planning requires a formal but participatory mechanism to judge the relevance and quality of proposals for funding generated by the schools. It is of utmost importance that the criteria for approval are transparent, fair and objective. It should be chaired by

the Regional Director and include Regional Education Officers (Secondary Education), Regional Financial Controller, a ROSE II Education Officer, principals from schools in other regions, and co-opted experts (such as those from the teacher training colleges). The panel will convene to review proposals. The panel in the second and third year will review the performance of the school over the previous year against the targets set out in the school improvement plans and evaluate the plans for the coming year to see whether they should be funded in full. The authority of the panel will be formalized by a letter from the Permanent Secretary.

(e) Operational Manual

A draft Operational Manual in four volumes was prepared and discussed with the MOEYC before Negotiations. Volume I contains the overall information about the Project; Volume II is on Financial Management, Volume III is on Procurement, and volume IV is the School Improvement Planning Manual. The Manual provides detailed criteria and terms of reference for project implementation arrangements, including requirements and procedures for implementation of each component and subcomponent. During negotiations, the draft agreed upon and the final version will be provided to the Bank as a condition of effectiveness.

(f) Accounting, reporting, and auditing arrangements

The financial management of the project (including accounting, reporting audits and disbursements) will be coordinated by the PCU (ROSE Secretariat), which is currently in the process of finalizing the overall financial management system. To facilitate disbursements, a Special Account will be established and managed according to Bank guidelines as prescribed in the Disbursement Handbook. The project will be audited annually by an independent auditor acceptable to the Bank, and special purpose audits will be carried out on an interim basis to audit the subprojects. Details of all financial management arrangements are presented.

D. Project Rationale

1. Project alternatives considered and reasons for rejection:

The first is a centrally planned approach (similar to that adopted by ROSE I) which aims to deliver essential inputs to schools. Although ROSE I has proven that this approach has achieved some success, it also has limitations. For the reforms to take root in schools and for teachers and administrators to change their behaviors, the wider school community (including students) must participate in planning and decision making for school improvement. When this occurs, stakeholders take ownership and chart the course of their own destiny. This is consistent with the school-based initiatives and accountability called for in the White Paper. ROSE II is attempting to strike a balance between the centrally directed and school-based approach. Institutional strengthening of the central ministry, the regional offices and teachers colleges and support for ministry-led literacy and mathematics initiatives has been included as part of the project to complement school-based initiatives to improve quality and equity.

A second approach that was considered was inclusion of a large scale civil works program. Although access is a major concern at the secondary level, a primary focus on civil works was rejected because:

- The amount of money available through the loan is small compared to the overall construction needs.

- It might expand access but would not address quality and efficiency concerns.
- It would limit the resources that could be made available for quality enhancing initiatives.
- Civil works programs can be slow to implement and take time to improve access.
- Since the absolute size of the secondary school age cohort is projected to decline over the next 20 years, alternatives that do not require large capital investments may be more appropriate in some geographic locations.
- The project will support a limited civil works projects but will also finance other more cost-effective alternatives for expanding access.

A third approach was a fast disbursing adjustment operation to provide budgetary support given the Bank's commitment to the overall GOJ's strategic vision and reform program. However, that reform program requires significant changes in the way actors and institutions throughout the system behave; these changes can best be supported by specific interventions and technical assistance. Furthermore, there are 3 adjustment operations in the portfolio. An investment operation will provide a balanced portfolio.

2. Major related projects financed by the Bank and/or other development agencies (completed, ongoing and planned).

The Bank is the only development agency focusing across the entire secondary sector. However, during Project Pre-Appraisal, the Bank chaired a meeting of the international agencies at which the following areas of collaboration were identified:

School development planning

DFID (the Jamaican All-Age School Project or AASP Project); IADB (Primary Education Support Project); HEART/NTA (Technical High School Development Project); USAID (New Horizons for Primary Schools Project).

Literacy

The National Initiative for Literacy encompasses a number of different MOEYC and other Government programs. With respect to the international agencies: DFID (JAASP project); UNICEF (Pre-Primary to Primary Schools Transition project [co-funded with USAID]); USAID (New Horizons Project); UNESCO (pilot Reading by Radio project; literacy surveys); IADB (integrated Literacy Intervention); World Bank (ROSE II).

Education Management Information Systems

Inter-American Development Bank (Primary Education Support Project); UNICEF (Early Childhood Census Data and Quality Monitoring System]); DFID (JAASP regional office strengthening);World Bank (ROSE I), USAID (New Horizons Project).

Sector Issue	Project	Latest Supervision (PSR) Ratings (Bank-financed projects only)	
		Implementation Progress (IP)	Development Objective (DO)
Bank-financed			
Improve efficiency and delivery of primary education and strengthen management and supervision capacity of MOEYC. Upgraded infrastructure, trained teachers and principals, constructed and equipped regional education offices and trained staff.	Social Sector Development Project, 1989-1996 (US$33.4 million)	S	S
Secondary education quality, equity, and efficiency and institutional strengthening. Supported physical upgrading of schools; a common core curriculum; rationalization of secondary level examinations; textbooks and support materials, local capacity for policy analysis; pilot of upper secondary curriculum.	Reform of Secondary Education, 1993-2000 (US$40.8 million)	S	S
Tertiary Education -- Student financial assistance to mitigate the negative impact on the poor of cost recovery in tertiary education; improvement of management efficiency of the Students' Loan Bureau and financial sustainability of the Students' Loan Scheme. (Ministry of Finance)	Student Loan Project, 1996-2001 (US$28.5 million)	U	S
Institutional development: policy framework, standards and certification system for early childhood workers, regional information resource network (Caribbean Child Development)	Early Childhood Education Institutional Development Grant, Closed (US$0.2 million) 1996 - 1998	S	S
Expansion and renovation of community owned facilities. Health (Ministry of Health)	Social Investment Fund Project, 1996-2001 HIV/AIDS Awareness and Prevention Project 2002 - 2007	S	S
Social Protection (Ministry of Labor and Social Security)	Social Safety Net Reform Project, 2001-2006 (US$40.0 million)		
Other development agencies			
Early Childhood Education and Development	Basic Education and Early Childhood Development		

	Program UNICEF, 1997-2001 (US$2.9 million)			
Early Childhood Education and Development and Care of Children Affected with HIV	Early Childhood Care & Development and HIV/AIDS Project CIDA, 2000- 2006 (US$3.2 million)			
Monitor Developmental Status of Young Children	Profiles Project, IADB, 1997-2001 (US$0.3 million)			
Early Childhood Education	Enhancement of Basic Schools Project, CDB, 2001-05.			
Primary Education	New Horizons for Primary Schools Activity, USAID, 1997 – 2004 (US$13.6 million)			
Primary Education	Primary Education Improvement Project II, IADB, OPEC, USAID, NDF, 1993-1999 (US$35.0 million)			
Primary Education	Primary Education Support Project, IADB, 2000-2005 (US$39.5 million)			
Primary Education	Training of Science Teachers Project, OAS, 1999-2001			
Primary Education	Primary Education Assistance Project II, USAID, 1990-1997 (US$5.6 million)			
Technical Vocational Education And Training	TVET Improvement Project, JICA, 1994-2002 (US$4.7 million)			
Primary Education	Jamaica All Age School Project, DFID, 1999-2003 (US$4.2 million)			
Primary Education	Commonwealth Debt Initiative, DFID, 1998-2001 (US$15.0 million)			
Drug Abuse Prevention	Integrated Drug Abuse Prevention Program, EU, 2000-2003			
Secondary Education	Secondary Schools Textbook Project, DFID, 1994-2000 (US$3.9 million)			

Non-Formal Vocational Training	Non-Traditional Skills Training For Low Income Women, IADB/MIF, 2000-2002 (US$1.7 million per region)		
Non-Formal Vocational Training	Tourism Human Resources Management System, IADB/MIF, 1997-2002 (US$1.5 million)		
Non-Formal Vocational Training	Strengthening vocational training system in Jamaica, GTZ, 1995-2003 (US$6.0 million)		
Non-Formal Vocational Training	Skills 2000, World Food Program, 1995-1999		
Non-formal Education and Training and Health promotion	Uplifting Adolescents I, USAID, 1995-2000 (US$7.0 million)		
Non-formal Education and Training and Health promotion	Uplifting Adolescents II, USAID, 2000-2004 (US$4.8 million)		
Non-Formal Vocational Training	Human Capital Development Project, IADB/MIF, Workforce Development Foundation, 1992-2000 (US$3.5 million)		
Non-Formal Education	JAMAL Teacher Workshops, UNESCO, pipleline (US$0.01 million)		

IP/DO Ratings: HS (Highly Satisfactory), S (Satisfactory), U (Unsatisfactory), HU (Highly Unsatisfactory)

3. Lessons learned and reflected in the project design:

The implementation experience of ROSE I, which was just completed, has highlighted a number of important lessons. ROSE I focused on expanding access, improving quality, equity, efficiency through provision of necessary quality inputs and strengthening the institutional capacity to manage and monitor the reform. While ROSE I laid the foundation for the reform, its model was supply-driven, and the main challenge for implementation, among other things, was for the Ministry to coordinate and synchronize delivery of all the inputs. This does not necessarily result in changed behavior of teachers and students in the education process. The persistent low achievement of secondary school students and the lack of impact of teacher in-service workshops which focused on methodology (as opposed to subject matter content) in raising achievement also calls for the follow-on project to change the design and focus.

ROSE II, therefore, emphasizes:

- high standards for all students, especially those performing below grade level, with a strong focus on literacy and numeracy to ensure that no one is left behind;
- greater financial and technical support to schools to address their deficiencies through school-based management;
- improvement in the implementation process with performance indicators and greater accountability; and
- use of diagnostic tools (in the form of tests) to identify learning difficulties and misconceptions of students in core subject areas in Grades 7 to 9 and to provide a support package consisting of teachers guide and suggested activities to address the learning weaknesses. In-service training is to be site based and centered around the specific learning problems of students.

In addition, the considerable experience of various school improvement planning processes has been used to design component 1.

4. Indications of borrower commitment and ownership:

Government commitment. The Government exceeded the ROSE I target of implementing ROSE curriculum in 72 schools by extending it to 500 schools in 1999-2000 and then to all schools which offer lower secondary education nationwide in 2000-2001. This common core curriculum across all school types will continue to equalize educational opportunities for secondary education. The GOJ requested Bank assistance for a follow-on project to deepen the reform.

Policy environment. The MOEYC's White Paper on Education (February, 2001) adopted policy and set targets that are not only consistent with ROSE but also push the agenda much further beyond the original conception to ensure the sustainability of reform in all levels of education in Jamaica.

Institution/management effectiveness. The MOEYC has integrated its reform in its daily operation and has allocated recurrent and capital budgets to support the continuation of the reform. Unit heads who have gained so much experience in ROSE will continue to implement the measures in ROSE II. Regional offices will support the decentralization drive to improve effectiveness of supervision and support. ROSE trainers have been absorbed as regular staff in Teachers' Colleges, and their experience and intimate knowledge of the teachers who went through the in-service training will not be lost.More broadly, the MOEYC has been engaged in a Corporate Planning process which will sharpen management

roles, responsibilities and accountability for results.

Technical viability. ROSE I has contributed significantly to develop technical capacity in curriculum development, textbook development, planning and student assessment.

Financial viability. The GOJ's commitment to education is not in doubt. In spite of the difficult macroeconomic conditions, education is likely to receive priority attention in the budget process. However, it should be noted that much of the increases in recurrent expenditure have been absorbed in teachers' salaries. It is the non-salary expenditure that needs to be monitored to ensure that educationally effective inputs are protected.

Stakeholders' participation. Principals, teachers, parents, and the community have been working together. The Jamaica Teachers' Association representatives meet monthly with senior officials in the central ministry to discuss policies and issues. The whole education system is based on partnership. School-based management approach will further enhance the participation of the stakeholders.

5. Value added of Bank support in this project:

The Bank is the only international agency supporting the comprehensive reform of secondary education in Jamaica and has been doing so since the late 1980s. While other bilateral agencies have financed the development of textbooks, technical education in secondary schools, and infrastructure improvement of a limited number of schools with secondary level students, the Bank's long standing involvement in ROSE and its complementarity with other development partners are widely accepted by MOEYC. The value added of Bank support in this project are in four aspects: (i) attending to policy analysis and policy options; (ii) bringing intentional experience to bear in project assessment; (iii) emphasizing learning and capacity building (Continuous Learning Framework), and (iv) drawing from local expertise and stakeholders' knowledge.

Policy analysis. Long before project preparation began, a sector study on Jamaican Secondary Education (World Bank, 1999) was undertaken to identify the issues and options for intervention. The report was discussed at a stakeholders' conference, which was chaired by the Minister of Education and attended by officials from the central ministry and regional offices, representatives of other Ministries, parliamentarians, principals, teachers, school board members, parents, students, bilateral and multilateral agencies, and the press. The consensus that emerged provided a sound basis for this operation.

To deepen the analysis of policy options identified in the sector study, the PHRD Grant was sought to finance six additional work. Three of the studies centered around education finance with the aims to enhance equity and efficiency of resources use (alternative funding formula, assessment of impact of cost recovery on students, and a feasibility study of restructuring teachers' salaries). One study focused on the assessment of the capacity for school-based financial management and procurement. The other two studies addressed the issues of education quality (alternatives for use of technology for teacher training and the implications of ROSE in regional and national examinations). These studies cover a broader range of policy options than the scope of the final project design, but they point to directions that need to be considered for the reform to sustain.

International experience. A unique Bank comparative advantage is to bring international

experience to bear in project assessment and design. The task team comprises seasoned professionals who have worked not only in Jamaica, but in other Caribbean countries, Latin America, Africa, Central Asia, East Asia, the Middle East, and OECD. Individually and collectively, they shared lessons learned from other projects with the MOEYC. In addition, representatives from other organizations were invited to join the preparation missions to share experience with Jamaica, to provide an external perspective and to validate Bank team's judgement. These individuals are as follows:

- The Social Sector Specialist of the United Nations' Economic Commission for Latin America and the Caribbean, who had assessed the impact of Chile's interventions in 900 disadvantaged schools, took part in the social assessment to study the school culture and the teaching and learning environment in Jamaica; and

- The Director-General of the Korean Ministry of Education, who has the combined experience of a policymaker, planner, and manager of an extremely successful education sector, undertook institutional analysis and assessment of the issues of tertiary education.

Continuous learning framework. During preparation, the Bank facilitated learning and networking of MOEYC officials and project staff with their counterparts in other projects in other countries. The team studied Brazil's Fundescola Project, which has time-tested successful experience in school development planning and has developed a highly sophisticated MIS with which to track process, inputs, outputs and outcomes in tens of thousands of schools in hundreds of municipalities within 19 states instantaneously. A Jamaican delegation plans to visit Fundescola, while the Brazilians plans to visit ROSE II during the mid-term review in order to learn from one another.

Lessons in school improvement planning in other countries -- Trinidad and Tobago' Basic Education Project, HEART/NTA's Technical High Schools Development Project, DFID's Jamaican All-Age School Project, IADB's Primary Education Support Project, and USAID's New Horizons for Primary School Project, Scotland's Self-evaluation using performance indicators, and Hong Kong's Quality Assurance in School Program -- were reviewed as an input to design the SIP component.

To strengthen the MOEYC's capacity in civil works management, the Bank sponsored the ROSE Technical Coordinator to participate in a joint technical assessment of schools in Uruguay, with architects and engineers from Brazil, Nicaragua, Costa Rica, and Uruguay.

National expertise and stakeholders' knowledge. Last but not the least is that the Bank drew on local knowledge extensively. The team visited about 60 schools during all the missions combined, listening to the voices of principals, teachers, students and parents. The best, as well as not so good, practices were noted and successful interventions at the school level were collected. Advice from reflective practitioners have been sought during preparation, as it will be sought during implementation. In a parallel track, all PHRD funded studies paired international consultants with local consultants to facilitate cross-fertilization of ideas. A senior academic staff in the University of the West Indies was invited to be the external peer reviewer of the Project to ensure Jamaican perspectives are incorporated into the design.

In summary, the Bank's value added is to mobilize international and national expertise to strengthen policy analysis and project design, and to facilitate the development of a continuous learning framework.

E. Summary Project Analysis (Detailed assessments are in the project file, see Annex 8)

1. Economic (see Annex 4):

● Cost benefit NPV=US$22 million; ERR = IRR 13.4% at a discount rate of 12 % (see Annex 4)

( ) Cost effectiveness

( ) Other (specify)

The Project's economic impact was analyzed by comparing the net increased lifetime earnings with and without the expanded access component. The net present value and the internal rate of return (IRR) were computed for three sub-components: construction of new schools, extension of existing schools and bursaries to participating independent schools. A sensitivity analysis was performed by changing the basic assumptions about internal efficiency, labor market outcomes, and civil works cost overrun and delays.

The analysis shows that expanding access to upper secondary education is profitable: the net present value is US$ 22,104,892 at the discount rate of 12 percent and the internal rate of return is 13.4 percent. In fact, all three sub-components have reasonable returns (see Table 6).

Table 6. NPV and IRR of Whole Component and Three Sub-Components, US$

	New schools	Extension	Scholarship	Whole component
NPV (12%)	3,029,770	19,232,978	2,227,437	22,104,892
NPV (10%)	29,665,451	54,025,779	7,515,286	83,599,131
NPV (5%)	358,892,312	468,981,673	51,672,605	840,124,281
IRR	12.8%	14.5%	13.4%	13.4%

Source: Mission estimates.

In addition, secondary education has large externalities in Jamaica by producing better-informed and more responsible citizens, as well as simply by producing better workers. Also quality secondary education might be necessary condition for economic development, although not a sufficient one. Given the high rate of broken households, crime and teenage pregnancy in Jamaica, engaging youths in senior high schools would help reduce the social problems. Lastly, econometric studies also show a positive impact of education on health for both children and adults.

In conclusion, the economic analysis shows that the investments in the ROSE II Project are expected to be highly beneficial both for direct beneficiaries and for the society as a whole.

2. Financial (see Annex 4 and Annex 5):

NPV=US$ million; FRR = % (see Annex 4)

In 2001/02 the Government of Jamaica budgeted US$426.6 million, or 15 percent of its total budget, for the education sector. The financing plan includes US$23.2 million in Government financing.

Fiscal Impact:

The Project's incremental recurrent costs correspond to: (i) teacher and administrative staff salaries for new schools, as well as salaries for specialized staff (counselors) who will be working in the schools, and project staff contracted during the project implementation period; (ii) reproduction and printing of materials to carry out the student evaluations; (iii) office supplies; and (iv) maintenance of

civil works, equipment and furniture. The GOJ will fund these recurrent cost as part of its counterpart contribution.

After the completion of implementation, Project staff will not remain in the Ministry, thereby reducing the recurrent cost to $6 million per year during the operational period. The incremental recurrent cost will amount to 1.6 percent of the total recurrent expenditure on education, or 4.7 percent of the total recurrent expenditure on secondary education. Since all recurrent costs incurred by the project will be fully financed by the GOJ from the outset, these costs will not represent a sudden increase in burden after the end of the Project. (The CAS of 2002 has programmed the loan into the external debt forecast.)

3. Technical:

The following questions were carefully assessed during appraisal:

- The overall approach to the literacy and mathematics strategies: in particular, their link to existing literacy programs run by other donors and the MOEYC's Literacy Plan, and whether the program should support all teachers to teach reading and mathematics across the curriculum or the creation of reading and mathematics specialists.
- Seek agreement on financial management process for allocating resources to schools based on School Improvement Plans
- The strategy for improving the guidance and counseling system
- How best to enhance libraries in schools: whether to rely on the School Improvement Planning process or provide some central support from MOEYC.
- How the MIS enhancements will be made consistent with the activities of other agency projects.

4. Institutional:

4.1 Executing agencies:

The Ministry of Education, Youth and Culture will be the Executing Agency. It has successfully implemented Reform of Secondary Education Project I (ROSE I) and has learned useful lessons for this follow on project. The Permanent Secretary has overseen the reform program through chairing the Reform Management Committee, which comprises all Division Directors, Unit Heads, and representatives of Regional Offices.

4.2 Project management:

Project management will improve the matrix model utilized in ROSE I. The ROSE Secretariat is the PCU that will continue to assume core project management and support functions while the relevant MOEYC division will be responsible for the implementation of project activities. The PCU will report to the Director of Projects in the Division of Project Management Technical Services that oversees all externally funded projects and civil works. There will be more systematic supervision of financial management and procurement. The structure, staffing and reporting relationships for the ROSE Secretariat are shown in the Proposed Operational Structure for ROSE II, Annex 18.

4.3 Procurement issues:

Procurement issues with the previous education project were assessed and addressed. Local planning and contract management capacity will be strengthened as needed. Within the proposed operational structure for ROSE II, the Project Administrator with the assistance of a procurement officer will be responsible for all procurement. The procurement officer will implement all procurement activities, including procurement planning, procurement processes, contract award and contract information system. The Procurement Officer will report to the Project Manager while maintaining a functional relation with the Chief Procurement Officer in the Ministry. Technical assistance will be provided to strengthen the capacity of schools involved in the project to prepare, appraise, and supervise their projects. A detailed procurement plan covers the procurement of works, goods and consultants services according to the Project Operational Manual and with conditions acceptable to the Bank will be prepared. Procurement records are foreseen to keep track of time taken to implement key steps and to monitor all activities. (See Annex 6 for detailed arrangements).

4.4 Financial management issues:

The PCU is adequately staffed to implement the project, and will add additional staff to the financial management function, as agreed during appraisal. There is an appropriate segregation of duties within the PCU and MOEYC to ensure the effective and efficient management of all resources. The PCU is responsible for submitting financial reports to various departments and divisions in the MOEYC and Ministry of Finance and Planning (MOFP) on a monthly basis, and will report to the Bank on a semester basis through the submission of the project management reports (PMRs).

To facilitate the disbursement of funds, the GOJ/MOFP will establish a Special Account (SA), to be operated by the ROSE Secretariat under terms and conditions satisfactory to the Bank. The project would be audited annually. Project audit arrangements will also include interim special purpose audits to review the community-based component of the project. Details of all financial management arrangements can be found in Annex 6.

5. Environmental: Environmental Category: B (Partial Assessment)

5.1 Summarize the steps undertaken for environmental assessment and EMP preparation (including consultation and disclosure) and the significant issues and their treatment emerging from this analysis.

Environmental assessment has been jointly conducted by the MOEYC's Technical Services Director, Building Coordinator, and several members of the National Environmental Planning Agency (NEPA) of the Ministry of Land and Environment and the Bank team. The environmental legislation governing construction of small civil works was reviewed, and the three selected sites for new schools were visited. The screening procedures for environmental impacts were in place for site selection and for construction of schools. The environmental screening process was found to be satisfactory.

5.2 What are the main features of the EMP and are they adequate?

The MOEYC has selected three sites for new school construction based on enrollment demographics. No significant environmental issues are associated with two of the sites, Riversdale and Mile Gully. The third site, located in Discovery Bay, is on coastal property and will likely undergo more intense scrutiny by NEPA during the review process than the other two.

The MOEYC is required to send proposed school construction plans to NEPA for review, once topographical studies have been completed and architectural models have been drawn. Schools are not

projects which require a permit from NEPA; however, any proposed new construction requires review by the Agency, and any project involving effluent waste disposal requires a license. This will be the case for schools constructed under the ROSE II project: a permit will not be required, but certain licenses will.

NEPA's screening procedures for site selection involve review by various technical branches, including the coastal zone management unit, water resources, cultural properties, and protected habitats and species. The proposed MOEYC sites will be reviewed to ensure that appropriate buffer zones to water and other resources are respected; that protected areas and/or habitat for endangered species are not affected, that appropriate water and sewerage systems suitable to the soil and water tables in the area are designed; and that cultural and historical properties in the area are not adversely affected by erecting a new school. Minimum review time by NEPA for this type of construction is eight weeks; however, if additional review is necessary because of issues associated with site selection, the review time may be longer.

The standard procedure is for the MOEYC to submit its site and construction plans to NEPA once completed. However, the MOEYC took proactive steps by involving NEPA immediately in the site selection process, with NEPA staff visiting the three sites prior to the MOEYC submitting design plans to NEPA. The purpose is to avoid delays at the review stage by the possible rejection of the selected sites, and to improve project design early in the preparation process.

NEPA, upon reviewing and approving proposed projects, provides guidelines to avoid and mitigate negative environmental impacts during the construction phase, to which the MOEYC is required to adhere. These guidelines are based on the World Bank procedures for the construction of small civil works, and include such standard procedures as keeping dust down through spraying of water during construction, ensuring proper disposal of construction waste, requiring temporary latrines to be constructed for workers, etc. A copy of some of the documentation required by NEPA for review of proposed projects can be found in the Bank's project files.

Architectural designs of the new schools have not yet been completed, although the prototype design has been done. The MOEYC confirms that materials are locally manufactured, and that designs are appropriate for the geographical location of the sites. School models will be reviewed to ensure appropriate design by NEPA. The design will also include features to ensure that physically disabled students have access to the schools.

The main features of the EMP are found to be adequate.

5.3 For Category A and B projects, timeline and status of EA:
Date of receipt of final draft: February 28, 2002

5.4 How have stakeholders been consulted at the stage of (a) environmental screening and (b) draft EA report on the environmental impacts and proposed environment management plan? Describe mechanisms of consultation that were used and which groups were consulted?

The MOEYC has consulted with local school principals regarding the necessity and location of new secondary schools at all three sites. Prior visits by the Bank's architect and consultants had led to meetings with local residents, who expressed support for the schools due to the opportunities for education they will bring. The affected communities are aware that the new schools are being built. The MOEYC has agreed on some kind of standard procedure to follow to inform the three communities of the

proposed schools.

5.5 What mechanisms have been established to monitor and evaluate the impact of the project on the environment? Do the indicators reflect the objectives and results of the EMP?

This EA has been submitted to the Bank's InfoShopin April 2002. The GOJ has disclosed this document to the public in the MOEYC's website.

6. Social:

6.1 Summarize key social issues relevant to the project objectives, and specify the project's social development outcomes.

Youth at risk, particularly in the urban areas, is a key social issue. International experience indicates that one of the best ways to address the problems of youth-at-risk is to keep adolescents in school and to improve their academic performance. The project objectives are directly related to these goals. Poor academic performance, violence in schools and increasing teenage pregnancy – all are risk factors for youth that will be addressed. Inequalities in access and the high attrition rate among students from the poorest quintiles are other key social issues that will be addressed by the project.

The desired social development outcomes of the project are to extend access and participation in upper secondary education of children from poorer families, to reduce the dropout of children from poorer families, to improve the quality of the secondary education that they receive while at the same time providing remedial education to a large segment of the intake, and to raise their performance levels in standardized examinations. In short, to improve the reading skills of all students, and to ensure that students from poor families and with reading difficulties are given the extra support they need to become functional adults upon graduating from secondary school.

6.2 Participatory Approach: How are key stakeholders participating in the project?

The MOEYC has always taken a participatory approach in discussing its policy and strategies with stakeholders. The teachers' union is fully consulted on a regular basis and so is the major Opposition Party. In conducting the ROSE II social assessment, discussions were held with representatives of some 50 schools in all six regions. These discussions and interviews targeted principals, teachers, guidance counselors, students and parents. Discussions were also held with MOEYC Regional Directors and Guidance Officers, four NGOs, out-of-school youth, and the Maroon community in deep rural areas.

The Guidance and Counseling Unit of the MOEYC, co-operated with the social assessment initiative by conducting interviews with representatives of all critical stakeholder groups, in the six regions of the Ministry. The aim of these interventions was to learn the perspectives of stakeholders regarding: (a) The kinds of problems students face in schools and at home, why they become disengaged in school, as well as the kind of academic and extra-curricular activities which excite them; (b) parents' expectations of their children and school; (c) teachers' approaches to dealing with students with behavioral and academic problems; (d) teachers' approaches to dealing with homework; (e) Regional Offices' approaches to addressing issues of youth-at-risk, and the kind of training that would improve their effectiveness; and (f) the adequacy of the Guidance and Counseling system. The Guidance and Counseling Unit of the Ministry of Education, Youth and Culture, has submitted at the request of the Ministry, its concerns, as well as recommendations regarding the role of the Unit in the implementation of the ROSE II project which have been taken fully into account. It submitted proposals for its role in the implementation of ROSE II.

6.3 How does the project involve consultations or collaboration with NGOs or other civil society organizations?

A number of NGOs and faith-based organizations, working with adolescents and youth, were consulted during the social assessment. NGOs which operate secondary educational institutions as well as others which provide critical support services to secondary level students are to be consulted concerning their possible involvement in the ROSE II project.

Another group of NGOs which could become involved in the project are those offering programs for out-of-school youth and youth-at-risk such as the YMCA, YWCA, Youth Opportunities Unlimited, Addiction Alert and the National AIDS Committee. Some of these NGOs already have a close working relationship with the Government of Jamaica but could be engaged, as a group, through the Council of Voluntary Social Services (CVSS), the primary umbrella organization for NGOs in Jamaica.

Additionally, the project should endeavor to conduct national, broad-based stakeholder consultations on a biennial basis, as well as an end-of-project consultation, in order to keep stakeholders (civil society, business sector and international development partners) informed of new and on-going developments and to solicit their feedback regarding project outputs and outcomes. Students should be involved in the process through the National Secondary Schools' Council.

6.4 What institutional arrangements have been provided to ensure the project achieves its social development outcomes?

The primary social development outcomes for ROSE II involve (i) making schools more supportive of youth-at-risk through academic and extra-curricula activities and counseling services and (ii) broaden and deepen stakeholder participation in the secondary education system, thus ensuring greater access by the poor to upper secondary education.

The institutional arrangements that would facilitate this include:

(a) The process for developing School Improvement Plans requires the active participation of all stakeholders, including students and parents. Plans are explicitly tied to improving learning outcomes, especially reading, with grants available in the second and third years only if satisfactory progress is made. The grant allocation for each school will be based on the number of low-achieving and therefore most at-risk students in the school. In addition, it is intended that students will be responsible for designing activities for and managing a portion of the grant for their school.

(b) The role of the Regional Offices will be critical in linking schools with partners, providing training and exchange of experience on innovative ways to improve school performance within realistic limits of resource availability. Specific support is being provided to these offices through the project.

(c) Strengthening the networking/collaborative arrangements between the MOEYC and NGOs and other civil society organizations, possibly through the establishment of a *Stakeholders' Planning and Review Committee* which would identify opportunities for joint initiatives and elaborate arrangements for utilizing such opportunities. The Stakeholders' Committee would also carry out a monitoring function and feed recommendations into the ROSE Secretariat on an on-going basis. Secondary school students should be represented on this committee.

(d) Building the capacity of the Guidance and Counselling Unit of the MOEYC to enable the division to effectively implement the Guidance and Counselling Policy which is shortly to be approved by Cabinet. To this end, it will be necessary to increase the staff of the Unit at Centre to facilitate the training and special projects aspects of the work of the Unit.

(e) The Regional Offices will be responsible for identifying good practice in the use of School Improvement Grants, with dissemination of the lessons learned. Discussions will be had with the principals' and teachers' associations to discuss ways to identify and reward successful schools.

(f) The one school that offers secondary level education in Maroon communities in rural areas has equal access to project benefits as the other Primary and Junior High schools in the country.

6.5 How will the project monitor performance in terms of social development outcomes?

The monitoring of social development outcomes will necessarily need to flow from and be a subset of the overall monitoring plan. It is advisable that it make use of readily available data already being collected and collated by schools through the Ministry's administrative data collection systems and on a national population basis using the Survey of Living Conditions through monitoring the percentage of students by quintile enrolled in secondary (and primary) schools by type. Some elements that contribute to improved participation and performance, already being monitored, like enrollment rates, rates of attendance/absenteeism, and teacher qualifications, and performance on standard examinations (GSAT, CXC, etc.).

The literature on the subject suggests that poorer students in good schools with excellent facilities require special assistance to be able to effectively use these facilities if their performance is to improve. Therefore, it is critical to understand as soon as possible the outcomes of placement to assess whether the intervension is working, and to improve it along the way. Tracking these corrections will also be a part of the monitoring process. This two-pronged approach will thus allow for the participation of key stakeholders in a continuous way.

7. Safeguard Policies:

7.1 Do any of the following safeguard policies apply to the project?

Policy	Applicability
Environmental Assessment (OP 4.01, BP 4.01, GP 4.01)	● Yes ( ) No
Natural Habitats (OP 4.04, BP 4.04, GP 4.04)	( ) Yes ● No
Forestry (OP 4.36, GP 4.36)	( ) Yes ● No
Pest Management (OP 4.09)	( ) Yes ● No
Cultural Property (OPN 11.03)	( ) Yes ● No
Indigenous Peoples (OD 4.20)	( ) Yes ● No
Involuntary Resettlement (OP/BP 4.12)	● Yes ( ) No
Safety of Dams (OP 4.37, BP 4.37)	( ) Yes ● No
Projects in International Waters (OP 7.50, BP 7.50, GP 7.50)	( ) Yes ● No
Projects in Disputed Areas (OP 7.60, BP 7.60, GP 7.60)*	( ) Yes ● No

7.2 Describe provisions made by the project to ensure compliance with applicable safeguard policies.

Resettlement of Squatters. Twenty-seven squatters (6 families) were on one of the school sites. The GOJ prepared an abbreviated resettlement plan (Annex 18) for families who have opted to relocate on their own. Building materials have been provided by the Government to the families and all families have been relocated by September 9, 2002.

F. Sustainability and Risks

1. Sustainability:

Overall, sustainability is highly likely for reasons discussed under Indicators of Borrower Commitment and Ownership (Section D 4). Reform of Secondary Education has the support of both major political parties.

The piloting of a scheme to provide bursaries for some places in private schools will increase flexibility and cost-effectiveness in the use of the public education budget, especially if it is successfully expanded after the life of the project.

Many of the activities proposed in the project do not increase recurrent spending: teacher training, provision of books and materials, technical assistance; indeed, improving educational outcomes will increase the efficiency of resource use in the longer run.

The civil works activities (new and extended schools) will increase recurrent costs. However, these are estimated to be about 2 percent of total secondary education spending (i.e. the equivalent of four new schools in a total of 155) and so much less than 1 percent of overall education spending.

2. Critical Risks (reflecting the failure of critical assumptions found in the fourth column of Annex 1):

Risk	Risk Rating	Risk Mitigation Measure
From Outputs to Objective		
MOEYC's efforts to reduce the percentage of primary school graduates reading below the grade level to 20 percent may not materialize. Insufficient prior preparation of students in primary education may negatively impact on the achievement in secondary education.	S	Continued coordination with MOEYC's Primary Education Coordinator, IDB, USAID, and DFID to monitor progress and to be ready to change strategy in secondary education. Initiative under PESP and the remedial programme at Grade 4 will mitigate the risk.
Persons trained under the project may not remain in the system due to change of jobs, retirement and emigration	M	Ministry works to improve opportunity for professional development and career path for MOEYC staff
Funding for implementation of school development plans is not adequate	N	Project planning adequately addresses the funding requirements for school developing planning
	M N	
From Components to Outputs		
Financial management and efficiency measures do not improve the generation	M	Institutional strengthening and training of school based staff funded as part of project

and use of resources		
The wider school community does not participate in the design and implement-ation of school based projects	M	Adequate training of principals in need for community participation and public education campaign promote community participation
Counterpart funds are not available when needed	M	GOJ has made education a priority. In ROSE I, while civil works have to be spread out throughout the life of the project to comply with GOJ pre-financing requirement, for most part, slow implementation of certain components was less due to the unavailability of counterpart funds than the speed with which goods, works, and services were procured
Change in project staff may affect implementation	M	Matrix management structure will reduce loss of institutional memory.
Overall Risk Rating	M	

Risk Rating - H (High Risk), S (Substantial Risk), M (Modest Risk), N(Negligible or Low Risk)

3. Possible Controversial Aspects:

Provision of bursaries for private places in independent schools, while not entirely new in Jamaica, may prove controversial. Public information to ensure that the rationale behind the initiative, the selection of private schools and the selection of students for these schools, plus information about the evaluation of the scheme, will be required to ensure full transparency in the implementation of this activity. The MOEYC made submission to the Cabinet for endorsement of this scheme and written approval has been given.

The selection of sites for the construction of new schools and the extension of existing schools has been guided by a set of clearly defined criteria. However, demands for schools and extensions in areas not selected may create controversy.

G. Main Loan Conditions

1. Effectiveness Condition

During negotiations, the Project Operations Manual was agreed upon between the Government and the Bank.
The remaining conditions are:

- The independent auditors for the first year's audit have been contracted by the MOEYC.
- The PCU has been fully staffed and is operational.
- The financial management system for the project has been established.

2. Other [classify according to covenant types used in the Legal Agreements.]

H. Readiness for Implementation

☐ 1. a) The engineering design documents for the first year's activities are complete and ready for the start of project implementation.
☐ 1. b) Not applicable.

☐ 2. The procurement documents for the first year's activities are complete and ready for the start of project implementation.
☐ 3. The Project Implementation Plan has been appraised and found to be realistic and of satisfactory quality.
☐ 4. The following items are lacking and are discussed under loan conditions (Section G):

I. Compliance with Bank Policies

☐ 1. This project complies with all applicable Bank policies.
☐ 2. The following exceptions to Bank policies are recommended for approval. The project complies with all other applicable Bank policies.

Kin Bing Wu	Marito H. Garcia	Orsalia Kalantzopoulos
Team Leader	**Sector Manager/Director**	**Country Manager/Director**

Annex 1: Project Design Summary

JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II

Hierarchy of Objectives	Key Performance Indicators	Data Collection Strategy	Critical Assumptions
Sector-related CAS Goal: Ensure inclusiveness of growth and building human capital	**Sector Indicators:** Increase in young persons entering labor force with higher academic qualifications (defined as having passed any Grade 11 or higher certification examination) from 25.9% of ages 14-19 and 32.5 of ages 20-24 in 2000 to 30.9% and 37.5%, respectively, in 2007.	**Sector/ country reports:** MOEYC Annual Statistical Reports Labor Force Survey; Survey of Living Conditions	**(from Goal to Bank Mission)** Political will is sustained Stakeholders remain committed to goals of the reform Significant commitment on part of government, parents and the private sector to pursue targeted educational efforts to provide educational access, completion and quality for the poor Macro-economic progress is maintained to ensure job growth and demand for higher skills.
Project Development Objective: 1. Improved secondary school achievement	**Outcome / Impact Indicators:** Annual improvement in average scores on JHSC or GNAT in Language Arts and Mathematics in participating schools so that by 2007 there will be statistically significant improvement over the 2001 baseline measures. The data are to be disagregated by All-Age, P&JH, upgraded High, and traditional High schools. Average test scores of students who receive bursaries in Independent Schools will be monitored. Annual reduction in percentage of students scoring below 30% correct in Language Arts and Mathematics on the JHSC or GNAT in participating schools so that by 2007 there will be a statistically significant difference. The data will be disaggrregated by school type	**Project reports:** JHSC examination results (MOEYC) GNAT examination results (MOYEC) JHSC examination results (MOEYC) GNAT examination results (MOYEC)	**(from Objective to Goal)** Recurrent and capital budgetary provisions and financial management are adequate. Improvement in primary education (through projects supported by the IDB, DFID and USAID) will improve quality and reduce the percentage of pupils reading below grade level from 30 to 20% by the time students graduate in Grade 6.

	as mentioned above.		
	Annual increase in the percentage of the eligible cohort in participating schools passing CXC Examination in Language and Mathematics so that by 2007 there will be a statistically significant improvement over the baseline measures.	CXC examination results	
	Annual increase in average daily attendance of students in participating schools over 2001 baseline.	Education Statistics (MOEYC)	Labor market demand weak due to bad economic conditions.
	Students whose places in private schools are subsidized by MOEYC have equal achievement outcomes in CXC and CESC to those in public schools, controlling for prior achievement in JHSC and comparison of unit cost.	Education Statistics (MOEYC) and CXC examination results	
2. Expanded access to upper secondary education, particularly among the poor	Statistically significant increase in the share of population aged 15-16 in the poorest quintile enrolled in secondary education in 2007 over 2001 baseline.	Survey of Living Conditions	Schools are built and extended on time and Independent Schools are willing to participate in the busaries sub-component.
	Statistically significant increase in the share of students enrolled in Grade 11 who sit CXC General English , CXC Mathematics, SSC English and SSC Mathematics from 2001 to 2007.	MOEYC statistics	The number of schools offering the CXC curriculum and the number of teachers qualified to teach the CXC curriculum will increase.
	Annual increase in the number of students in Grade 10.		Students want to attend the new and upgraded schools
3. Strengthened institutional capacity in Central Ministry and Regional Offices	Establishment and utilization of a management information system for secondary education that provides on-line, real time information for policy makers.	Instruments to be developed by Evaluation Unit (customer satisfaction)	Trained personnel remain in the education system and use their new skills and knowledge.
	Feedback from principals and teachers on the timeliness and quality of technical assistance and supervision provided by the regional offices. Target:	Special study (MOEYC Evaluation Unit)	MOEYC Corporate Planning process sharpens management roles, responsibilities and accountability for results

	90% satisfaction by project end.		
	Feedback from the regional offices on the timeliness in the delivery of inputs to schools and quality of technical advice given by the central ministry. Target: 90% satisfaction by project end.	Special study (MOEYC Evaluation Unit)	
	Feedback from students on the extent to which the school improvement plans are effectively tackling the main issues they feel are barriers to improved learning. Target: 90% satisfaction by end of 3-year SIP cycle.	Special study (MOEYC Evaluation Unit)	

Hierarchy of Objectives	Key Performance Indicators	Data Collection Strategy	Critical Assumptions
Output from each Component:	**Output Indicators:**	**Project reports:**	**(from Outputs to Objective)**
Component 1 School Improvement Grants	Number of school improvement plans received from: All Age schools (target = 46) P&JHS (target = 84) Upgraded High (target =64) 2 voacational/agricultural which are approved by the Regional Review Panels in first round for each year	Annual reports of Education Officers	Principals exercise leadership to galvanize teachers, students and parents.
	Copies of SIP manuals, on which schools and Regional Offices have been consulted, are available to each school at its training session	Annual reports of Principals and Education Officers	Significant commitment on part of stakeholders to assess needs and to identify and implement relevant interventions
	Percent of schools receiving funds from MOEYC with [one month] of approval of their school improvement plan, by school type. Target=100%	Annual reports of Principals and Education Officers	
	Percent of proposals fully implemented by end of each school year, by school type. Target=80%		
Component 2 Reform Support from MOEYC to the schools	Methodology and associated materials to address difficulties of patois speaking children at secondary level developed, following piloting in schools	Annual reports of Principals and Education Officers	Other projects focusing on literacy do not use methodologies sufficiently different from that developed under the project that teachers and Education Officers are confused and cannot effectively use the ROSE II methodologies and materials
	Methodology and associated materials to help students overcome aversion to mathematics and to use math developed, following piloting in schools	Annual reports of Principals and Education Officers	
	Valid and reliable diagnostic tools of learning difficulties of students in Grades 7-9, readily usable by teachers in the classroom setting, developed, printed and distributed to all schools in the project and being used by teachers	Project reports	

	Number of All Age schools with enhanced libraries and media resource centers	Annual stakeholder evaluations	
	Free foundation textbooks for all students in All Age schools and Junior Highs	Regional office's inspection of books in possession of students	Adequate number of textbooks printed and distributed
	Libraries and media resource centers in teachers colleges acquire all the materials they requested on the agreed timetable		
	Libraries and resource centers in Regional Offices have a complete set of materials to support teaching of the ROSE curriculum, of basic literacy and mathematics, and of all examinations within 6 months of a decision by the panel of regional offices of what should be available		
	JHSC is reliable and valid and is offered to all students in each subject, and these results are returned to schools by the agreed date.		
Component 3: Expanding access to Grades 10 and 11 cost-effectively	At least 1200 annual placements of students from low SES in Grade 10 and 11 in independent schools by year 2 of the project at a cost to the MOEYC of no more than the average recurrent unit cost in the public system	MOEYC Annual Statistical Reports and Project Accounts	GOJ recurrent and capital budgetary provisions are adequate and counterpart funds available when needed Private schools take appropriate measures to ensure bursary students stay enrolled
	3 new schools and extensions of 3 existing schools are completed within cost and according to agreed project designs; and are operational with a full complement of staff and materials when the first students are enrolled	MOEYC Annual Statistical Reports and Project Account	
Component 4: Institutional Strengthening	Delivery to ROSE schools of MOEYC inputs (curriculum guides, textbooks, educational materials, computers,	Project reports	

	furniture, laboratory consumables) meets service standards		
	Meeting physical and timeliness targets in procurement and use of equipment to increase efficiency in management .	Project reports, site visits	Individuals have incentives to stay in education sector and spread new knowledge and ideas
	Number of fellowships granted, studies completed, and beneficiaries returned to work in the education sector	Project reports	
Project Components / Sub-components: **1. School Improvement Grants** **2. Reform support** **3. Expand access to upper secondary education** **4. institutional strengthening**	**Inputs: (budget for each component)** **$11.0 million** **$11.8 million** **$28.0 million** **$9.1million**	**Project reports:**	**(from Components to Outputs)**

Baseline 2000/2001 Indicators for Monitoring ROSE II on Outcomes

Indicator	Age			Public School Type				Source
	Ages 14-19	Ages 15-16	Ages 20-24	All Age Grades 7-9	Primary & Junior High Grades 7-9	Former Comprehensive	Former Secondary High	
Persons entering labor force with minimum academic qualifications (defined as having passed any Grade 11 or higher certification examination)	25.9%	NA	32.5%	N/A	N/A	N/A	N/A	SLC 2000
Average scores on Junior High School Certification Examination (JHSC) or Grade 9 Achievement Test (GNAT) in Language Arts	N/A	N/A	N/A	(GNAT) 23.7%	(JHSC) 27.5%	(JHSC) 33.3%	(JHSC) 45.7%	MOEYC - Student Assessment Unit
Average scores on Junior High School Certification Examination (JHSC) or Grade 9 Achievement Test (GNAT) in Mathematics	N/A	N/A	N/A	(GNAT) 20.0%	(JHSC) 22.7%	(JHSC) 25.7%	(JHSC) 37.6%	MOEYC Student Assessment Unit
Percentage of students scoring below 30% correct in Language Arts on the JHSC/ GNAT	N/A	N/A	N/A	(GNAT) 32.2%	(JHSC) 28.1%	(JHSC) 8.6%	(JHSC) 0.1%	MOEYC Student Assessment Unit
Percentage of students scoring below 30% correct in Mathematics on the JHSC/ GNAT	N/A	N/A	N/A	(GNAT) 41.6%	(JHSC) 35.3%	(JHSC) 14.0%	(JHSC) 0.3%	MOEYC Student Assessment Unit
Percentage of the eligible cohort attaining grades 1-3 on CXC Examination in Language	N/A	N/A	N/A	N/A	N/A	10.3%	59.2%	CXC 2001

Percentage of the eligible cohort attaining grades 1-3 on CXC Examination in Mathematics	N/A	N/A	N/A	N/A	N/A	3.5%	29.5%	CXC 2001
Percentage of the eligible cohort attaining grades 4-5 on SSC Examination in Language	N/A	N/A	N/A	N/A	N/A	13.2	-	MOEYC Student Assessment Unit
Percentage of the eligible cohort attaining grades 4-5 on SSC Examination in Mathematics	N/A	N/A	N/A	N/A	N/A	2.1	-	MOEYC Student Assessment Unit
Average daily attendance of secondary students	N/A	N/A	N/A	71.7%	76.5%	84.0%	94%	MOEYC Planning/ Statistics
Share of population age 15-16 in the poorest quintile enrolled in upper secondary education	N/A	** 13.2%	N/A	N/A	N/A	N/A	N/A	Jamaica SLC 2000
Share of students enrolled in Grade 11 who sit CXC General English , CXC Mathematics, SSC English and SSC Mathematics.	N/A	N/A	N/A	N/A	N/A	CXC Maths-23.7% CXC English-29.8% SSC Maths-6.4% SSC English-23.1%	CXC Maths 79.4% CXC English 85.3%	MOEYC and CXC
The number students enrolled in Grade 10	N/A	N/A	N/A	N/A	N/A	23,486	11,413	MOEYC Planning/ Statistics
Promotion rates from Grade 9 to Grade 10, as defined as enrollments in Grade 10 as share of Grade 9 enrollment in previous year, less repeaters in Grade 9	N/A	N/A	N/A	N/A	N/A	*112%	*103	MOEYC Planning/ Statistics

* **Additional students entering from All Age and Primary and Junior High Schools**

** No data available for Upper Secondary Education only

Annex 2: Detailed Project Description
JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II

By Component:

Project Component 1 - US$11.00 million

School Improvement Plans

This component would finance grants to selected schools with secondary age students (upgraded High Schools, Agricultural/Vocational schools, Primary and Junior High Schools and All-Age Schools) on the basis of annual work programs and budgets for activities designed to improve student outcomes (attendance, retention and achievement). The project would finance direct costs associated with preparing and implementing school improvement plans. (Further details are provided in annex 14.)

1.1. Preparation of School Improvement Plans. School improvement planning is established in Jamaica and is being implemented under the following projects: Secondary Enhancement Program (21 Secondary High and Primary and Junior High schools funded by MOEYC); Technical High Schools Development Project (14 technical high schools funded by HEART Trust/National Training Authority and JICA); Jamaica All Age Schools Project (48 schools funded by DFID); and New Horizons (72 All Age schools funded by USAID). Schools eligible for ROSE II support under this component will be additional to these, and include up to 64 Upgraded High Schools, 84 Primary and Junior High Schools, 2 Agricultural/Vocational High Schools and approximately 46 of the larger All-Age schools; the remaining All-Age schools will be eligible for support under Component 2 of this project.

This Component would support: technical assistance for preparation of a School Improvement Plan (SIP) Manual and associated training materials; printing and distribution of the SIP Manual and training materials to all eligible schools; training in school development planning and school-based management for principals, school board members, teachers, education officers and school community representatives; travel and accommodation expenses for school teams involved in training and for Regional Review Panel members during the review process; and travel expenses for those schools staff providing advice to other schools.

1.2. Implementation of School Improvement Grants The project will provide grants (School Improvement Grants, SIGs) directly to schools for implementation of their school improvement plan, following its approval by the regional review panel. SIGs will finance, as appropriate, items on a positive list; major civil works will not be financed. All schools in Jamaica have bank accounts, and regularly receive operations and maintenance (O&M) allocations from the MOEYC into these accounts. For the SIGs, a separate account will be opened for each school, an agreement between the school and the MOEYC will be signed regarding the use of the grant in accordance with the school's approved SIP, and the MOEYC will release a payment for the first year's grant to the school. Subsequent year funding will be based on successful implementation of activities under the SIP and payment will be released when the school has provided a statement of expenditure and receipts to the Project Manager. The SIGs will be provided in accordance with eligibility criteria and procedures stipulated in the Legal Agreement and Operational Manual for the project.

Project Component 2 - US$11.77 million

Reform Support from the Central Ministry to the Schools

The second component will finance centrally coordinated activities that complement the bottom up approach and support all-age schools not eligible for SIGs.

2.1 Literacy and Mathematics Enhancement. This sub-component would support four activities designed to assist the 20 percent of secondary students who do not demonstrate full literacy to read and master mathematics at grade level, so that they can learn other subjects and study independently. First, it will finance technical assistance to devise a national strategy for tackling weak literacy and numeracy skills in all secondary schools. This strategy will support the implementation of the ROSE I curriculum and textbooks and be aligned with the MOEYC National Literacy Plan. Second, it will finance technical assistance to develop effective methodologies and support materials to address the conversion difficulty of patois speaking children to standard English, develop in them an interest in reading for information and for recreation, overcome their aversion to mathematics, and use mathematic concepts to address real life problems. Third, it will support the development of valid and reliable diagnostic tools of learning difficulties to help teachers and schools better link assessment to instructional decision making and learning. Fourth, it will provide a support package for approximately 12,000 secondary teachers, including teacher guides on how to identify and correct common misconceptions and mistakes in core subject areas. Fifth, it will support in-service training for [50] education officers, 4800 principals and teachers and for 40 teacher educators organized around these methodologies, tools and packages.

2.2 Strengthening Teaching and Guidance. This sub-component will finance the provision of free foundation books to all students in All-Age and Primary and Junior High Schools. This will ensure that the poorest students will all have access to their own textbooks for study and homework. It is essential that these materials are available to each student at the beginning of the school year. This will reduce the administrative burden in these schools of collecting this fee, and reduce parent-school tensions over its collection. As with the existing scheme, students would be expected to return the books at the end of the school year for use by other students the following year. In place of the parental contributions, the MOEYC will make a contribution to the Textbook Account to cover the cost of the production and distribution of books to these students.

This sub-component will finance the provision of instructional and related inputs (literacy and mathematics materials, textbooks, library materials and curriculum and teacher's guides) to secondary schools, along with related in-service training for teachers, education officers and teacher trainers. It will support the provision or upgrading of library and Media Resource Centers for regional offices of the MOEYC for access to the internet and the World Wide Web.

Improved library and media resource centers in schools are needed to support the literacy and mathematics enhancement programs and to develop the skills for life-long learning. Some enhancement of libraries will be funded through school improvement plans (see component 2.1). However, given the magnitude of the need for enhanced library facilities, there may be a need for direct funding for libraries from the Ministry outside the SIP activities. Schools will make decisions on the library materials required and the MOEYC, through its Library Services facility will procure and distribute the materials. The libraries of teachers colleges would be upgraded to support the training of teachers in secondary education, especially in the teaching of reading and mathematics. Those teachers colleges with secondary education training programs would be invited to prepare a plan to enhance their libraries. Funds would be allocated to support these plans, based on numbers of full-time equivalent teachers (pre- and in-service) that they teach secondary education courses to annually, based on the average number taught over the last three years. The plans submitted by the teachers colleges would be approved by a committee of all the Heads of Secondary Education in the colleges, chaired by the MOEYC. The

materials would then be procured through the Library Services facility of the MOEYC and distributed to the teachers' colleges.

The libraries and resource centers of the Regional Offices would be upgraded. A committee of representatives from each Regional Office would agree on the list of materials that each region needs to effectively support the ROSE curriculum and the teaching of basic literacy and mathematics. Each office would identify the resources they lack and the MOEYC, through the Library Services facility would procure and distribute the items needed.

In-service training in curriculum implementation for teachers, education officers and teacher trainers could be considered. Furthermore, training to strengthen guidance and counseling methods is needed. The MOEYC has recently re-organized its provision of support to schools for guidance and counseling, placing a guidance counselor in each Regional Office. These counselors will be working increasingly closely with schools. Primary and Junior High Schools and High Schools all have counselors whose skills and knowledge need to be upgraded according to the new MOEYC strategy and the new roles identified for counselors. In addition, the MOEYC is determining how to support counseling services in All Age Schools: this component would fund some activities identified by the MOEYC.

Project Component 3 - US$ 28.00 million

Expanded Access To Upper Secondary Education.

This component will provide access to upper secondary school to over 5,000 students, including 20 percent of Grade 9 graduates who otherwise would not have access to a place at Grade 10, through civil works and secure excess capacity in independent secondary schools.

3.1 **Civil Works.** This sub-component will fund the construction of three new schools and extension of three existing schools where the density and stability of the relevant school-age population justify; consultants for preparing the final architectural drawings based on standard designs and for pre- and post-contract supervision of civil works for new and extended schools; support for the operation and maintenance of new and extended schools; and staffing (including teaching, managerial and support staff for new and extended schools). Sites for new construction have been identified and an environmental assessment has been completed.

3.2 **Bursaries for Independent School Places.** This sub-component will provide bursaries for approximately 1,300 Grade 9/10 student places in independent schools meeting the quality standards of the MOEYC: the curriculum conforms with that prescribed by the MOEYC, the quality of teachers meet the required standards, and the proper facilities such as science laboratories, Resource and Technology rooms are in place. An announcement of the program soliciting interest from the independent school sector will be published, and qualified schools and number of places identified. These schools will be listed along with public secondary schools on the JHSC registration form, allowing students to indicate their preference for these schools along with public schools. Placement would be handled in accordance with standard procedures. Bursaries to private schools will cover all fees and will be provided in accordance with the terms specified in the Loan Agreement and the Operational Manual for the project. (More details are provided in annex 15.)

Project Component 4 - US$9.12 million

Institutional Strengthening

This component will support the MOEYC and Regional Offices to implement the above components successfully, as their role shifts from centralized development, acquisition and provision of school inputs to one that responds to school-based demands for technical assistance and continuous support and monitors outcomes.

4.1. Management Information System. The project will provide support for the development of a secondary school management information system and for imaging systems and digital cameras to improve documentation of procurement of civil works, goods and services; training in the use of the MIS and related inputs; and provision of computers systems to schools and regional offices so that they can utilize the new MIS system and funding for the operation and maintenance of these computer systems.

The MOEYC is developing parts of an MIS system for primary schools, as part of its corporate planning exercise, through a USAID-funded project. This component would complement these other efforts.

4.2. Enhancing Efficiency and Effectiveness. The project will provide support for institutional strengthening of the MOEYC and Regional Offices through the following: (a) fellowships, study tours and attendance of international conferences for professional development of education officers; (b) technical assistance to develop instruments to measure various outcomes, including management efficiency and cost effectiveness; (c) training to make more efficient use of existing facilities; (d) provision of computer and other equipment to selected divisions within the Ministry and support for the operation and maintenance of this equipment; and provision of equipment and materials to enhance the libraries and/or learning resource centers of teachers colleges and the regional offices' resource room so that they can support the schools

4.3. Maintaining and fully utilizing assessment, monitoring and evaluation capacity. This sub-component will provide support to continue efforts to modernize and strengthen the student assessment unit. It will strengthen test development capacity by providing opportunities for education officers to upgrade their skills in line with current best practices; standardize test development processes across testing programs by training several officers in each aspect of test development, administration, analysis, and data storage and retrieval. This Subcomponent will also provide support for implementation of the Junior High School Certificate Examination that was designed with assistance from the ROSE I project. The JHSC will provide diagnostic information on students and baseline and evaluation data on schools.

Finally, the project will support the Project Coordination Unit, by financing the purchase of furniture, equipment and two vehicles, totaling approximately US$100,000.

Annex 3: Estimated Project Costs

JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II

Project Cost By Component	Local US $million	Foreign US $million	Total US $million
School Improvement Plans to raise achievement of all student	10.93	0.00	10.93
Reform support from the central ministry to the schools	4.01	6.68	10.69
Expand access to upper secondary education	18.94	6.11	25.05
Institutional strengthening	6.38	2.26	8.64
Project Implementation unit	1.87	0.63	2.50
Front-end fee	0.00	0.40	0.40
Total Baseline Cost	42.13	16.08	58.21
Physical Contingencies	1.48	0.91	2.39
Price Contingencies	1.35	1.05	2.40
Total Project Costs[1]	44.96	18.04	63.00
Total Financing Required	44.96	18.04	63.00

Project Cost By Category	Local US $million	Foreign US $million	Total US $million
Civil works, equipment and furniture	7.78	8.49	16.27
Instructional Materials	0.48	4.26	4.74
Student Assessment, Training and TA	11.51	2.93	14.44
Bursaries for places in independent schools	2.00	0.00	2.00
School Improvement Plans	9.89	0.00	9.89
Recurrent Cost	10.47	0.00	10.47
Front-end-fee	0.00	0.40	0.40
Physical & Price Contingencies	2.83	1.96	4.79
Total Project Costs[1]	44.96	18.04	63.00
Total Financing Required	44.96	18.04	63.00

[1] Identifiable taxes and duties are 0 (US$m) and the total project cost, net of taxes, is 63 (US$m). Therefore, the project cost sharing ratio is 63.17% of total project cost net of taxes.

Annex 4: Cost Benefit Analysis Summary
JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II

This annex begins by briefing the project context and description. It then performs a cost-benefit analysis by estimating the discounted present value of the net benefits and internal rate of return of the project. To analyze the risks, a sensitivity analysis is also performed by relaxing the basic assumptions. The section concludes by discussing the externalities generated by increasing the quality of secondary education.

Project context and description

The ROSE II Project's overarching objective is to build human capital in Jamaica by: (a) improving the quality and equity of secondary education; (b) expanding access to upper secondary education; and (c) strengthening the capacity of the central ministry and the regional offices. To achieve these goals, ROSE II funds the following four components:

- School improvement plans to improve achievement and to address youth-at-risk issues
- Reform support from the Central Ministry to the schools
- Expanded access to grades 10 and 11
- Institutional Strengthening

While the impacts of the project's four components are intertwined and not easy to separate, this economic analysis focuses only on the component of expanding access, which provides quantifiable outcomes and measurable parameters for the cost-benefit analysis. As the other components address the quality of education, they are very difficult to quantify.

Expanded access to upper secondary education will be achieved through three options in order to allow for greater flexibility and to maximize cost-effectiveness:

- Construction of three new schools (US$ 9 million)
- Extension of three existing schools (US$ 4 million)
- Bursaries to private, Independent Schools (US$ 2 million)

Bursaries to schools means the financing of places in independent secondary schools with excess capacity; intended to subsidize lower income families for whom the economic stagnation has made it difficult to send their children to private schools and are not able to access upper secondary education in public schools because of limited space. Such excess capacity can be utilized to provide immediate access.

Summary of Benefits and Costs:

The cost-benefit analysis compares the net increase in lifetime earnings with and without the project component of expanded access. The discounted expected present value of its benefits, net of costs, i.e. the net present value (NPV), is computed. To compare cost-effectiveness of building new schools, extending existing schools and providing bursaries to Independent Schools, the internal rate of return (IRR) is also computed for each sub-component.

The analysis takes into account all incremental costs to the government and beneficiaries in addition to the fiscal costs of each project sub-component. The public costs considered in the analysis

include the capital investment and recurrent costs such as salaries and benefits of teachers and administrative/technical staff, equipment, library books, maintenance and utilities. It should be noted that, in view of the excess capacity at Independent Schools, the computation of the net benefit of the bursaries does not include capital costs or other incremental costs to the government besides its funds for bursaries to private schools (about US$ 560 per student). The use of these funds is at the disposal of each Independent School that receives them. Data on students' direct costs of secondary education, which include tuition and fees, extra lessons, books, transport, lunch and snacks, uniforms and other supplies, are taken from The Jamaica Survey of Living Conditions. Students' foregone earnings are computed using the average expected wage of those of an age group who attained junior secondary education only.

In the entire analysis, the estimated incremental benefits of the project are based on projected increases in future incomes resulting from attainment of senior secondary education. The earnings differentials between workers with only primary education, junior secondary and senior secondary education, respectively, are calculated using 1998 Labor Force Survey (Table 4.3). The analysis uses the expected earnings differential by educational attainment (multiplied by the current employment rate for each age group). Given the high unemployment in Jamaica, this should make the analysis more realistic. (For the unemployment rate and the expected earnings differential see Table 4.3.)

The result of the analysis shows that expanding access has positive present value under the basic assumptions which are presented below. The net present value is US$ 22,104,892 at the discount rate of 12 percent and the internal rate of return is 13.4 percent. In fact, all three sub-components expect very high economic rate of return for its investments, leading to large total net benefits even at the discount rate of 12 percent. The ROSE II Project thus compares favorably with most Bank projects in other sectors.

Table 4.1. NPV and IRR of Whole Component and Three Sub-Components, US$

	New schools	Extension	Bursaries	Whole component
NPV (12%)	3,029,770	19,232,978	2,227,437	22,104,892
NPV (10%)	29,665,451	54,025,779	7,515,286	83,599,131
NPV (5%)	358,892,312	468,981,673	51,672,605	840,124,281
IRR	12.8%	14.5%	13.4%	13.4%

Among the three interventions, the extension of existing schools has the highest internal rate of return by a small margin. This is due mainly to the fact that the extended facilities will be exclusively used by senior secondary students; by contrast, the newly constructed schools are full secondary high schools, accommodating both junior and senior high students (about 40 percent will be senior high students). According to Annex 15 of the PAD, the amount of bursary per student is less than 70 percent of the government's per capita costs of building new schools. Naturally, the program of providing bursaries turns out more cost-effective than the construction of new schools although less cost-effective than the extension of existing schools. A half of the bursary funds (about US$ 1 million) may finance students who will repeat grade 9 before entering into senior secondary education to ensure their academic success. (about 40 percent of its beneficiaries are allowed to repeat grade 9.). It should also be pointed out that since the shadow price for increasing the number of students in private schools is almost zero, the schools will spend most of the additional funds from the bursary program on desirable measures to improve the quality of education; these will include hiring more teachers to keep class sizes small or purchase of books for the library or equipment and materials for classroom instruction. The bursary program may thus be able to contribute to improved quality of education particularly in private schools;

this is not captured in the current cost-benefit analysis.

Main Assumptions:

The basic assumptions are that: (a) there is no repetition and no drop-out given the automatic promotion policy in Jamaica; (b) the civil works will take a year; (c) the school buildings newly constructed or expanded in existing schools will function for thirty years; (d) wage coefficients are considered fixed at the current level.

Sensitivity analysis / Switching values of critical items:

There are various possible sources of overestimation of the net benefits of expanded access.[3] The various sensitivity tests have been undertaken to take these issues properly into account; their results are summarized below in Table 4.2.

Table 4.2 Results of Sensitivity Analysis, US$

	no automatic promotion*	decline in earnings differential**	problems in civil work***
New Schools			
NPV (12%)	-205,192	-2,166,577	-2,968,473
IRR	11.97%	11.7%	11.6%
Extension			
NPV (12%)	15,308,747	12,878,091	10,513,695
IRR	14.1%	13.8%	13.7%
Scholarships			
NPV (12%)	2,227,437****	1,748,355	n.r.*****
IRR	13.4%	13.1%	n.r.

* repetition rate=10%, drop-out rate=5%

** repetition rate=10%, drop-out rate=5%; 5% discount in earnings differential between junior and senior high school graduates

*** repetition rate=10%, drop-out rate=5%; 2 year delay in the civil works, 25 year life span of the school buildings and 20% cost overrun

**** The same as the basic assumption of repetition (40 percent of the beneficiaries will be grade 9 repeaters.)

***** n.r. : not relevant

The sensitivity analysis changes the basic assumptions. First, it is assumed that the project tries to ensure that learning is occurring, with an associated repetition rate of 10 percent in senior secondary school. It may be also be realistic to count about 5 percent who cannot enroll as dropouts. Since the ROSE II Project addresses, in particular, the youth at risk issue by improving the quality of education, this seems reasonable, in particular: not too low. Higher repetition and dropout in senior high schools would slightly lower NPV and IRR for both new school construction and of school extension; but the ROSE II Project still proves to be a worthwhile investment.

Second, historically, Jamaica has experienced a trade-off between the quantity and quality in its initiative to expand education. Enlarging the supply of workers with senior secondary education might be also likely to reduce the earnings differential between junior and senior high school graduates. This is especially likely if the recent negative growth persists in Jamaica. To take account of this possibility, the

benefit of attaining senior secondary education has been reduced by 5 percent in earnings disparity between junior and senior high school graduates throughout all working ages (in addition to the assumption of 10 percent repetition and 5 percent drop-out). The decline in earnings differential again make little difference to NPV and IRR: IRR lowers about 0.2-0.3 percent for all three sub-components.

Lastly, there are also risks in civil works such as the delay and cost over-run as seen in the ROSE I Project, and possibly a shortened life span of school buildings due to limited financing of maintenance (most of the Government's recurrent costs are spent on teachers' salaries and benefits.) It is, then, assumed that there would be 20 percent cost overrun, a two-year delay in the completion of the civil works and school buildings' life would span 25 instead of 30 years (in addition to the assumption of 10 percent repetition and 5 percent drop-out). This assumption has slightly more negative impact on the outcome of the investment than that of the 5 percent discount earning differential between junior and senior high school graduates; but the overall impact is still slight. The internal rate of return lowers by 0.4 percent for both of the new school construction option and the school extension option.

In sum, the outcome of the cost-benefit analysis is robust, i.e., the investment of the ROSE II Project will generate acceptable or high economic rate of return even if many plausible risks are considered.

On the other hand, there are also other factors which are not captured in the cost-benefit analysis which would lead to an underestimation of net benefits. The use of pretax earnings differential between junior and senior high school graduates will raise the benefits of the project. The government and employers can also save money from widely prevalent provision of remedial training program for current and future employees in Vocational Training Centers and other community centers. In 1999/2000 the HEART/NTA provided J$ 12 million (US$ 270,000) for remedial training in Vocational Training Centers only and its cost per trainee was about J$ 7,100 (US$ 160). Positive economic growth would also increase project benefits.

Given the high rate of debt financing of the Jamaican government, the effect of the project on public finances should be also considered. However, its overall impact is rather small and the efficiency gains and improved workers' productivity seem to offset the burden. The government may also consider raising students' cost-sharing in the future since exclusive public high schools in which wealthy students predominate have very low tuition and fees compared to private ones.

Externalities

Secondary education has large externalities in Jamaica as in other parts of the world, and as established by various researches and studies. It is rather obvious that secondary education has externalities by producing better-informed and more responsible citizens as well as simply producing better workers. The recent study such as the 2001 OECD PISA, which reviewed students' learning achievement of many countries, seems to lead to the conclusion that quality secondary education might be necessary condition for economic development, although not a sufficient one. Furthermore, given the high rate of broken households, crime and teenage pregnancy in Jamaica, engaging youths in senior high schools would help reduce the social problems. Econometric studies also show a positive impact of education on health for both children and adults. Mother's education has a positive effect on child health independent of household income and community health services; furthermore, students' additional education significantly reduces the reported incidence of chronic illness, with the impact especially strong among the adults aged 14-49 (Handa 1998 and 1999). Sudanshu Handa, Gender and Life-Cycle Differences in the Impact of Schooling on Chronic Disease in Jamaica, Economics of Education Review,

17(3), 1998; and Sudanshu Handa, Maternal Education and Child Height, EDCC, 47(2), 1999..

Conclusion

The economic analysis shows that the Bank's and the government's investment in the ROSE II Project are expected to be highly beneficial, both for direct beneficiaries and for society as a whole.

Table 4.3. Average monthly earnings and unemployment rate by age and educational attainment (in JD$)

Age	Primary A	Junior High B	Senior High C	Earnings Differences D= C-B	Unemp Rate (%) E	Expected Earnings Differences F=(C-B)*(1-E)
14-19	7,253	8,403	8,197	-206	43.7%	-116
20-24	9,140	8,644	12,880	4,236	28.6%	3,025
25-29	8,184	10,377	13,323	2,946	14.8%	2,510
30-34	7,928	8,622	14,003	5,381	14.8%	4,585
35-39	9,841	11,015	22,821	11,806	9.0%	10,743
40-44	10,399	11,192	30,061	18,869	9.0%	17,171
45-49	8,723	9,886	44,603	34,717	5.2%	32,912
50-54	6,636	9,960	44,255*	34,295	5.2%	32,512
55-59	8,813	10,412	43,448	33,036	4.9%	31,417
60-64	8,603	8,754	47,227	38,473	4.9%	36,588
> 64	6,636	9,960	10,750	790	0.8%	784

* estimated

Source: Labor Force Survey, 1998

Annex 5: Financial Summary

JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II

Years Ending

	IMPLEMENTATION PERIOD						
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
Total Financing Required							
Project Costs							
Investment Costs	7.6	10.3	16.5	11.5	5.0	0.0	0.0
Recurrent Costs	0.8	0.5	1.0	3.3	6.4	0.0	0.0
Total Project Costs	8.4	10.8	17.5	14.8	11.4	0.0	0.0
Front-end fee	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Financing	8.4	10.8	17.5	14.8	11.4	0.0	0.0
Financing							
IBRD/IDA	5.1	7.4	11.0	9.0	7.3	0.0	0.0
Government	3.3	3.4	6.5	5.8	4.1	0.0	0.0
Central	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Provincial	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Co-financiers	0.0	0.0	0.0	0.0	0.0	0.0	0.0
User Fees/Beneficiaries	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Project Financing	8.4	10.8	17.5	14.8	11.4	0.0	0.0

	OPERATIONAL PERIOD						
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
Total Financing Required							
Project Costs							
Investment Costs	2.2	2.2	2.2	2.2	2.2	0.0	0.0
Recurrent Costs	6.0	6.0	6.0	6.0	6.0	0.0	0.0
Total Project Costs	8.2	8.2	8.2	8.2	8.2	0.0	0.0
Front-end fee	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Financing	8.2	8.2	8.2	8.2	8.2	0.0	0.0
Financing							
IBRD/IDA	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Government	8.2	8.2	8.2	8.2	8.2	0.0	0.0
Central	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Provincial	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Co-financiers	0.0	0.0	0.0	0.0	0.0	0.0	0.0
User Fees/Beneficiaries	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Project Financing	8.2	8.2	8.2	8.2	8.2	0.0	0.0

Main assumptions:

Incremental recurrent costs correspond to: (i) salaries of teachers that will be hired once the schools are built, (ii) two incremental technical staff at the central level; (iii) staff of the project coordination unit during

project implementation, (iv) student assessments; and (v) teacher training. Incremental recurrent costs will be covered by the GOJ, through counterpart funds.

After the completion of implementation, Project staff contracted during implementation will not remain in the Ministry, thereby reducing the recurrent cost to $6 million per year during the operational period. The incremental recurrent cost will amount to 1.6 percent of total recurrent expenditure on education, or 4.7 percent of total recurrent expenditure on secondary education. Since all recurrent costs incurred by the project will be fully financed by the GOJ from the outset, these costs will not represent a sudden increase in burden after the end of the Project.

Annex 6: Procurement and Disbursement Arrangements
JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II

Procurement

(A) Procurement Arrangements

Procurement for the proposed project would be carried out in accordance with World Bank " *Guidelines: Procurement Under IBRD Loans and IDA Credits*", published in January 1995 (revised January/August 1996, September 1997 and January 1999); and "*Guidelines: Selection and Employment of Consultants by World Bank Borrowers*" (revised in September 1997, Jannuary 1999, and May 2002), and the provisions stipulated in the Loan Agreement.

1) Procurement methods: The methods to be used for the procurement described below, and the estimated amounts for each method, are summarized in Table A. The threshold contract values for the use of each method are fixed in Table B.

Procurement of Works

Works procured under this project would include construction of three schools and extension of three schools totaling US$13.3 million equivalent. Works estimated to cost more than US$1,500,000 will be procured following International Competitive Bidding procedures (ICB) procedures, using Bank-issued standard bidding documents. Works estimated to cost less than US$1,500,000, up to an aggregate amount of US$3.3 million will be procured following National Competitive Bidding procedures (NCB) using standard bidding documents agreed in advance with the Bank.

Procurement of Goods

Goods procured under this project would include computer equipment, furniture for schools, science and electronic labs, technology equipment and instructional materials such as guides and support materials, and literacy/math & diagnostic materials totaling US$10.5 million equivalent. To the extent possible, contracts for these goods will be grouped into bidding packages of more than $150,000 equivalent and procured following International Competitive Bidding (ICB) procedures, using Bank-issued Standard Bidding Documents (SBDs). Contracts with estimated values below this threshold per contract and up to an aggregate amount of US$1.3 million may be procured using National Competitive Bidding (NCB) procedures and standard bidding documents agreed with the Bank. Contracts for goods which cannot be grouped into larger bidding packages and estimated to cost less than US$25,000 per contract, up to an aggregate amount of US$1.1 million, may be procured using shopping (National /International) procedures based on a model request for quotations satisfactory to the Bank.

Selection of Consultants

Consulting services will be contracted under this project in the following areas of expertise: design and construction drawings for the extension of schools, inspection of the construction of the schools, development of guidance materials, adaptation and installation of MIS, development of literacy/math enhancement program, development of diagnostic materials, technical assistance to improve management efficiency and effectiveness, and evaluation of ROSE II Project. These services are estimated to cost US$5.7 million equivalent and would be procured using Bank Standard Request for Proposals.

Firms: All contracts for firms would be procured using QCBS, except for contracts costing less than US$100,000 that would be procured using CQ up to an aggregate amount of US$400,000.

Individuals: Specialized advisory services would be provided by individual consultants selected by comparison of qualifications of three candidates and hired in accordance with the provisions of paragraphs 5.1 through 5.3 of the Consultant Guidelines, up to an aggregate amount of US$0.3 million.

Training: Category for training activities does not involve procurement processes. It includes expenditures for: (i) cost of tuition, venue, food, and traveling to provide and/or attend seminars on: roles of guidance counselors, continuous assessment, Inter-School Collaboration, maximize use of existing facilities, Literacy/Mathematics and Diagnosis; and (ii) costs of venue, food, traveling and tuition for graduate fellowships; and cost of training the MOE's staff on the use of the MIS. Training services are estimated to cost US$5.8 million equivalent.

School Improvement Subprojects (SIP): The Loan would partially finance the cost of goods and services for the implementation of demand driven sub-projects to be proposed and implemented by schools, under agreements signed with the MOE. SIP are estimated to cost US$10.0 million equivalent. The sub-projects will be selected and implemented following the procedures established in the Project Operational Manual.

Bursaries: The loan will provide Bursaries for placement in independent schools. No procurement is involved in this category.

Recurrent Costs, Student Assessment and Other Government financed Costs: Recurrent costs such as: costs of salaries of the PCU staff, incremental school staff, physical facilities, services and goods for the PCU, and operation and maintenance will be entirely financed by Government. Additionally, the Government will entirely finance the cost of Junior High School Certificate Examination and contribution to the Caribbean Examination Council Examination. The procurement of the goods and services included in these categories will be made in accordance with Government procedures.

2) Prior review thresholds: The proposed thresholds for prior review are based on the procurement capacity assessment of the Project Implementing Unit and are summarized in Table B. In addition to this prior review of individual procurement actions, the procurement plan will be reviewed and approved by the Bank annually.

(B) Assessment of the agency's capacity to implement procurement

A Project Coordination Unit (PCU) to be established under the Minister of Education, Youth and Culture (MOEYC) will carry out procurement activities. This Unit will be composed a Project Manager, a Procurement Officer, a Project Administrator and support staff, and work in close coordination with a Project Financial Manager who will manage the project funds. Staff from the Technical Services Directorate will prepare technical specifications for works and goods. The Educational Services Division in close coordination with the Planning Development Division will prepare terms of reference for consultant services. The proposed organization arrangement and proposed staffing of the PCU are satisfactory. The Project's Operational Manual (OM) will include standard bidding documents to be used for each procurement method, model contracts for works and goods procured on the basis of three quotations or shopping and procurement procedures for School Improvement Projects.

An assessment of the capacity of the PCU to implement procurement actions for the project has been carried out and was approved by the Regional Procurement Advisor on May 15, 2002. The assessment reviewed the organizational structure of the proposed Project Implementation Unit within the MOE.

The main risks identified in the assessment include: (i) The Project Implementation Unit (PCU) has yet to be established and consequently, its performance is yet to be seen; (ii) although the Project Manager and the Procurement Officer have been selected, they have not yet assumed duties; (iii) the MOEYC lacks a system to adequately maintain procurement records; (iv) the MOEYC lacks standard documents for NCB, shopping, and bid evaluation forms; and (v) the MOEYC lacks experience in managing civil works contracts with in-house resources, although the intent is also to contract out some services. The following plan to address these risks is included in the PCA report and was agreed by the MOEYC:

By negotiations: (i) The procurement features that are not consistent with the Bank Guidelines will be spelled out in the Loan Agreement with a clear indication that on those issues the Bank Guidelines will prevail. They are (a) requirement for registering in the Government Register for participating in any Government's tender; and (b) two-envelope system in the submission of bids with an envelope containing the pre-qualification documents. (ii) The Operational Manual which includes a clear description of the project management organization, including delegation of authority and functions will be submitted to the Bank for review. The Operatonal Manual will include procurement procedures, standard bidding documents and standard bid evaluation forms. The standard bidding documents should specify submission of bids for goods and works in one envelope only.

By effectiveness: (i) The Operational Manual has been issued by the MOEYC and agreed by the Bank. (ii) All PCU staff in place, including a qualified Procurement Officer. (iii) Submission to the Bank of satisfactory terms of reference for the procurement of consultant services due to start during the six first months of project implementation. (vi) Zubmission to the Bank of satisfactory terms of reference for the consultant(s) to be responsible for civil works contract management.

During Project Implementation: (i) All TORs to be scrutinized by the Planning and Development Division before sending them to the Bank. (ii) The Procurement Officer will be trained and attend a Bank Procurement seminar before starting any procurement action. (iii) Initial Bank's supervision mission would validate the establishment of adequate filing system of documents, and electronic data bases on procurement and financial records of contracts financed under the loan; (iv) implementation of a computerized system for financial management during the first year of project implementation. (v) Before the bidding process for the construction of civil works starts, the consultant responsible for the management of civil works should be hired.

The overall project risk for procurement is HIGH. The project is eligible for FMR-based disbursements on procurement reporting grounds in view that the project includes the implementation of a Management Information System.

(C) Procurement Plan

At appraisal, the Borrower developed a procurement plan for project implementation that provided the basis for the aggregate amounts for the procurement methods (per Table A). This plan was approved by the RPA and is in the project files. At the beginning of each calendar year, the Borrower will update the Procurement Plan with a detailed procurement schedule for the coming year.

Procurement methods (Table A)

Annex 6, Table A: Project Costs by Procurement Arrangements (in US$million equivalent)

Expenditure Category	Procurement Method				Total Cost
	ICB	NCB	Other	N.B.F	
1. Works	**10.0** (8.3)	**3.3** (2.6)	**0.0** a/ (0.0)		**13.3** (10.9)
2. Goods: 2.a Equipment and Furniture 2.b Instruction Materials	**3.9** (3.4) **4.4** (3.7)	**1.0** (0.9) **0.3** (0.2)	**0.3** b/ (0.3) **0.6** (0.5)		**5.2** (4.6) **5.3** (4.4)
3. Consultant Services[c] 3.a Technical Assistance 3.b Student Assessment			**4.0** c/ (3.2)	 **5.5** (0.0)	**4.0** (3.2) **5.5** (0.0)
4. Training Services			**5.8** d/ (5.3)		**5.8** (5.3)
5. School Improvement Projects			**10.0** e/ (9.0)		**10.0** (9.0)
6. Grants (Bursaries for placement in independent schools)			**2.0** (2.0)		**2.0** (2.0)
7. Recurrent Costs and Other Gov. financed costs				**11.5** (0.0)	**11.5** (0.0)
8. Front end fee			**0.4** (0.4)		**0.4** (0.4)
Total	**18.3** (15.4)	**4.6** (3.7)	**23.1** (20.7)	**17.0** (0.0)	**63.0** (39.8)

Note: N.B.F. = Not Bank-financed.

Foot-Notes:

a/ Three quotations

b/ Shopping (National and International)

c/ Consultants Services. Details provided in Table A-1

d/ Include: cost of venue, food, materials, tuition and traveling to provide and/or attend seminars on. Procurement of training materials with a cost estimate less than US$25,000 will be procured using shopping procedures.

e/ demand driven sub-projects to be proposed by schools, and to be procured in accordance with procedures to be defined in the Project Operational Manual

Table A1: Consultant Selection Arrangements (optional)
(US$ million equivalent)

Consultant Services Expenditure Category	Selection Method							
	QCBS	QBS	SFB	LCS	CQ	Other	N.B.F.	Total Cost[1]
A. Firms	3.30	0.00	0.00	0.00	0.40	0.00	0.00	3.70
	(2.70)	(0.00)	(0.00)	(0.00)	(0.30)	(0.00)	(0.00)	(3.00)
B. Individuals	0.00	0.00	0.00	0.00	0.00	0.30	0.00	0.30
	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.20)	(0.00)	(0.20)
Total	3.30	0.00	0.00	0.00	0.40	0.30	0.00	4.00
	(2.70)	(0.00)	(0.00)	(0.00)	(0.30)	(0.20)	(0.00)	(3.20)

1\ Including contingencies

Note: QCBS = Quality- and Cost-Based Selection
QBS = Quality-based Selection
SFB = Selection under a Fixed Budget
LCS = Least-Cost Selection
CQ = Selection Based on Consultants' Qualifications
Other = Selection of individual consultants (per Section V of Consultants Guidelines), Commercial Practices, etc.
N.B.F. = Not Bank-financed
Figures in parenthesis are the amounts to be financed by the Bank Loan.

Prior review thresholds (Table B)

Annex 6, Table B: Thresholds for Procurement Methods and Prior Review

Expenditure Category	Contract Value (Threshold)	Procurement Method	Contracts Subject to Prior Review
	US $ thousands		US $ millions
1. Works	> 1,500	ICB	All: 10.0
	< 1,500	NCB	All: 3.3
2. Goods	>150	ICB	All: 8.3
	< 150	NCB	First three: 1.3
	<25	Shopping	First two each year: 0.1
3. Consultants andTraining Firms	>100	QCBS	All: 3.3
	< 100	CQ	Audit services
Individuals	> 25	See Section V of Guidelines	All (TOR, contract, CV)
	<25		Only TOR
Total value of contracts subject to prior review:			26.3

Overall Procurement Risk Assessment:

High	X
Average	
Low	

Frequency of procurement supervision missions proposed: Based on the overall risk assessment (HIGH), it is recommended two two full supervision missions per year to visit the field to carry out post review of procurement actions, in addition to the prior review to be carried out from Bank offices. The post-review field analysis should cover a sample of not less than 1 in 5 contracts signed.

Disbursement

Allocation of loan proceeds (Table C)

Table C: Allocation of Loan Proceeds

Expenditure Category	Amount in US$million	Financing Percentage
1. Works	10.00	85%
2. Goods (including instructional materials	7.70	100% of foreign and 85% of local
3. Consulting Services	3.00	85% of foreign and 80% of local
4. Training	4.70	90%
5. School Improvement Grants	8.00	90%
6. Bursaries	2.00	100%
7. Front End Fee	0.40	100%
8. Unallocated	4.00	
Total Project Costs	39.80	
Front-end fee	0.00	
Total	39.80	

Annex 6 B: Financial Management and Disbursement Arrangements

Country Issues

The Jamaica Country Financial Accountability Assessment (CFAA) was completed by the Bank in April 2001 and many of the recommendations made in the report are in the process of being implemented by the government. Some of this implementation is supported by the ongoing Bank-supported *Public Sector Modernization Project,* which is addressing institutional restructuring of ministries, streamlining bureaucracy and procedures for service delivery, the automating of public services, preparation of the regulatory framework for strengthening regulatory agencies and completing remaining concessions, and development of an efficient civil service.

The proposed arrangements in the project FM Assessment take into account the recommendations made by the CFAA and the current status of public sector financial management in Jamaica.

Financial Management and Disbursement Arrangements

Implementing Entities

The MOEYC will be the implementing entity and a Project Coordination Unit (PCU) – the ROSE Secretariat – will be established within the Ministry to coordinate all activities under this program. Regarding the financial management arrangements, the MOEYC has appointed an accountant (who has worked with the ROSE I). During appraisal, it was agreed with the MOEYC that two additional financial management staff would be contracted. The financial team will handle all aspects of day-to-day financial management, and also liaise with the MOEYC's Project Management and Technical Services Division

for matters of consolidation of budgetary and accounting information, and for monitoring the flow of funds to the project.

Funds Flow

Procedures for flow of funds from the loan and the required counterpart contribution will be implemented with due regard to safeguarding project's resources and ensuring timely execution of payments.

Loan funds will be disbursed to one Special Account (US dollar account for Bank funds), and this account will be utilized for the purposes of the implementation arrangements agreed. As is the current practice in Jamaica, the Special Account will be opened by the Ministry of Finance and Planning (MOFP) and maintained in a commercial bank. In accordance with the recommendations made in the 2001 CFAA, and in an effort to streamline the national account management, this special account, for accounting purposes only, will appear as a sub-account within the government's general consolidated accounts. The management of this account will be the responsibility of the PCU.

The PCU has prepared its budget request for the calendar year beginning April 1, 2002. The Government of Jamaica will allocate its counterpart funding into a local operational project account, based on appropriation warrants submitted by the MOEYC. On a monthly basis, a transfer in an amount equivalent to 30 days of estimated expenditures will be transferred from the Special Account to the project account, from which checks or transfers (in local currency) will be issued to the providers of goods and services. The project will reconcile (monthly) the project account as well as the Special Account, and submit the documentation regarding both accounts, to the Bank under each withdrawal application and Statement of Expenditure (SOE).

Additionally, the PCU will advance funds (on a revolving fund basis, similar to the Statement of Expenditure) to the qualifying schools which, under the project, will receive financial support for specifically approved activities in their annual work plans, and which are eligible for financing under the project. To ensure transparency of the flow of funds, this arrangement will require detailed accounting at the school level, while also likely requiring a bank account at the school level for project funds, since all financial transactions will flow directly from the PCU's Project Account to the accounts established for each school. Furthermore, this will allow all expenditures under the project to appear as expenditures for the MOEYC and in addition will appear in the MOEYC's financial statements. This arrangement will fall under the normal scope of work for the annual external audit. The accounting and reporting for these funds will be the joint responsibility of the PCU and the individual schools. The PCU will ensure that appropriate financial reports are received and approved before continuing to disburse to the schools.

Accounting Policies and Procedures

Detailed project financial management procedures have been prepared by consultants and compiled into the Operational Manual. This was submitted to the Bank for review during loan negotiations. The following presents an outline of these procedures.

Administrative procedures will be in place to ensure that financial transactions are made with consideration to safeguarding project assets and ensuring proper entry in the accounting/monitoring systems. For project management and Bank monitoring purposes the PCU will report on detailed information *at the project level,* specifically the deposits to the special account and the expenditures classified by activity/ subcomponent and disbursement category.

It was deemed by both the PCU and the Bank, that the MOEYC's accounting system would not permit a detailed level of cost allocation, financial control and reporting. Therefore, the project will draw on the experience of other projects in Jamaica to obtain an off-the-shelf accounting package that can be adapted to project needs. Regarding the reports produced by the accounting system, please refer to the Report and Monitoring section below

The project accounting system will have the capacity to record assets, liabilities and financial transactions of the project, and produce financial statements useful to project management and meeting IBRD's fiduciary requirements. The accounting system is designed to be able to capture all financial information and allocate among project components/activities and both types of categories (the Bank's legal/disbursement categories and GOJ Budget categories) of expenditures. The accounting system will reflect revised/updated monthly/quarterly/annual actual funding needs and future budget estimates, based on current work flow and the status of procurement.

Segregation of duties. The project has a clear organizational structure and will operate under procedures established according to the norms under the Financial Administration and Audit Act (FAA Act). Said procedures support an adequate segregation of procurement, budgeting, payment and recording activities, and this was observed within the MOEYC during the appraisal mission. All payment orders/requests are reviewed and signed by the Project Manager and by the office of the Director (Director of Projects) of the Project Management and Technical Services Division (in the MOEYC) before being processed by the Accountant. All detailed procedures are contained in the operational manual for the project.

Budgeting. The loan agreement and project cost tables will be the main inputs for the project budgets and counterpart (GOJ) funding estimates under the Capital B Budget. The MOEYC will follow prescribed governmental budgetary heads, and in adherence to the FAA Act, the PCU/MOEYC will prepare at least:

- The annual work plan classified by work lines, with goals/objectives, physical and financial programs;
- the budget proposal specifying the sources of funds, the summarized and detailed expenditures by major areas, accounts, and specific objects;
- after approval by Parliament: the budget execution program broken down monthly, and the quarterly document of budgetary commitment authorization;
- the monthly report on budgetary execution to be issued within 5 days after the end of each month; and
- the quarterly report on evaluation of budgetary execution to be issued within 10 days after the end of the quarter

Safeguard over assets. Assets acquired by the project will be in the custody of the respective institutional departments of the MOEYC. For the proposed project, the PCU will keep detailed subsidiary records of plant and equipment acquired. The amounts in this register will be reconciled monthly against the respective accounting balances. At least one annual physical inspection will be undertaken by MOEYC staff, in addition to checks carried out by the external auditors and the Auditor General's Department.

Audit Arrangements

Internal Audit. The PCU will be subject to review by the MOEYC's Internal Audit Department and the country's Auditor General's Department (AGD). Although no internal auditor will be assigned specifically to the project, it will be expected that they will have some role in reviewing the project, particularly at the school level. The AGD, under its sampling/material criteria, will audit the project at least once before completion as part of its required governmental audit.

External Audit. Annual project financial statements will be audited in accordance with International Standards on Auditing, by an independent firm and in accordance with terms of reference (TORs) both acceptable to the Bank. In addition to the audit opinions on project financial statements, an opinion on legal compliance, Special Accounts and Statements of Expenditures (SOEs) will be required, along with the management letter.

The project is expected to adopt the recommendations of the consultants in determining any additional audit arrangements. These may include: (i) special purpose reports related to the observance of the procurement and consultants services provisions of the Loan Agreement; (ii) an audit carried out on a half-yearly basis to review the subcomponent and activities carried out at the local level by schools that receive grants; and (iii) a semi-annual memorandum on internal controls ("management letter") which would also form part of the annual audit. The consultants are expected to recommend the precise audit requirements, and recommend the most cost-effective means for having these audit activities carried out, given the three audit entities that will in some way be involved.

The PCU will appoint the auditors (for both the annual and special audits) by loan effectiveness, with an annual contract to be renewed during the first quarter of each subsequent year. The first audit of the project would cover funds managed up to March 31, 2003 (including any retroactive expenditures). The second audit would cover funds managed from April 1, 2003 through March 31, 2004, and all other subsequent audits would then follow the provisions of Section 4.01 (b) (ii) of the Loan Agreement.

The PCU will prepare, if needed, an action plan to address any issues and recommendations contained in the audit reports. The action plan and follow-up activities would be communicated to the Bank.

The table below summarizes audit requirements:

Audit Report	*Due Date*
Project financial statements	4 months after the end of the reporting period (coincides with GOJ requirements)
SOE	same as above
Special Accounts	same as above
Special purpose	Bursaries and SIP Grants

Reporting and Monitoring

Financial statements and reports will be prepared in formats satisfying the Government and IBRD's monitoring and fiduciary purposes.

On a monthly basis, the PCU will prepare the project's Statement of Expenditure (a government

required financial report which is not the same as the Bank's disbursement document), prepared as a matrix classifying receipts by financing source and expenditures by financing source and disbursement category. The expenditures would be compared to the projected figures per the quarterly budgets prepared as indicated in the Budgeting section above. This report is submitted to the MOEYC's Project Management and Technical Services Division, the MOFP's Financial Management Division. In addition to Statement of Expenditure, the monthly financial reports will include the Special Account Reconciliation Statements. Any difference in the amount of expenditures reported under the two financial statements must be clearly explained.

The project financial statements, along with the physical progress and procurement sections of the Financial Monitoring Reports (FMRs), will be submitted to the Bank on a quarterly basis, and will be submitted no later than forty-five (45) days after the end of each quarter. The contents of the FMRs will reflect planned and actual results in relation to the project's components, activities, and key performance indicators. FMR format and contents will be agreed between the Bank and the government by loan negotiations.

The annual financial statements will include the project financial statements as well as the schedule of Statements of Expenditure (SOEs) presented during the year in support of Withdrawal Applications, and a reconciliation of the Special Account. It is expected that the format of the audit reports will be similar to those utilized in the ROSE project.

Risk Analysis

Strengths and Weaknesses. Overall FM risk is considered to be moderate, although it must be mitigated by putting place appropriate procedures, particularly in the newer areas of activity (e.g. school grants). The Ministry's experience with the first ROSE project is a particular strength, along with the improved organizational structure which ensures oversight by MOEYC officials. Project financial management will be in effect when qualified staff are assigned to the project (partially completed), the procedures, controls and systems are properly established under the organization arrangements described previously, and arrangements for producing certain information relevant to the Bank are in place. The Action Plan (next page) aims at addressing these issues. The following table summarizes the Bank's assessment of financial management risk.

Risk	*Risk Rating*	*Risk Mitigation Measures*
Inherent risk		
Country specific	Medium	Establishment of specialized project [financial] unit (PCU) within MOEYC;
Entity/project specific	Low	Same as above.
Control risk		
Implementing Entity	Low	Same as above.
Funds Flow: loan funds	Medium	Appropriate procedures put in place, especially for the school grants
Funds Flow: counterpart funds	Medium	Approval of budget units prior to commencement of fiscal year.
Staffing	Medium	Establishment of the PCU; appointment of experienced FM personnel.
Accounting policies and procedures	Low	
Internal Audit	Low	Agreed cost-effective integration of the MOEYC's internal auditors with the efforts of the AGD and external auditors
External Audit	Medium	Appointment of auditors before effectiveness; interim audits of internal controls schools (on sample basis) – exact requirements to be determined prior to negotiations
Reporting and Monitoring	Medium	Bank support to generation of flexible draft FMRs prior to effectiveness
Information Systems	Medium	Draw on experience of other Bank-financed Jamaica projects, and receive technical advice from PHRD-financed consultants

Financial Management Action Plan

Action	*Responsible Entity*	*Completion Date*
1. Set up the PCU's new financial management system .	PCU	Before effectiveness; software obtained and procedures manual in draft by negotiations
2. Set up the system to classify accounting information by project disbursement categories and subcomponents.	PCU with support from PHRD-financed consultants	Board date
3. Approve the budgetary units in the National Budget.	MOEYCH/PCU	Before effectiveness/ Before commencement of each year (country's fiscal year) of project implementation
4. Perform physical inventories, at least annually, of the project's register of assets.	PCU, with the participation of the external auditors	Ongoing through project implementation
5. Finalize financial management section of the Operational Manual	PCU	Before effectiveness (draft by negotiations)
6. Submit audit TORs and short list of firms for approval	PCU/WB	Before negotiations
7. Appoint the external auditors	PCU/MOEYC	Before effectiveness
8. Submit draft Financial Monitoring Reports (FMRs).	PCU/MOEYC	Before effectiveness (agreed to format and content by negotiations)
9. Submit first FMR	PCU/MOEYC	45 days after the end of the quarter in which effectiveness takes place

Annex 7: Project Processing Schedule
JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II

Project Schedule	Planned	Actual
Time taken to prepare the project (months)	16	17
First Bank mission (identification)	04/30/2001	04/30/2001
Appraisal mission departure	01/14/2002	02/15/2002
Negotiations	08/26/2002	09/04/2002
Planned Date of Effectiveness	01/01/2003	

Prepared by:

Ministry of Education, Youth and Culture

Mrs. Marguarite Bowie, Permanent Secretary
Mr. Wesley Barrett, Chief Education Officer
Mrs. Valerie Been, Director (Planning and Development Division)
Mrs. Beverley Lawrence, Director (Project Management and Technical Services Division)
Mrs. Adelle Brown, Deputy Chief Education Officer (Curriculum Support)
Miss Barbara Allen, Assistant Chief Education Officer (Educational Planning Unit)
Mr. Dwight Hamilton, Senior Project Economist (Educational Planning Unit)
Mrs. Gertrude McKenzie, Education Officer (Educational Planning Unit)
Mrs. Janet McFarlane-Edwards, Senior Statistican, (Educational Planning Unit)
Mr. Lauriston Wilson, Director (Technical Services Unit)
Mrs. Jacinth Gordon, Director (Projects)
Ms. Claudette Marin, Director (Project Finance)
Mr. Arlie Dyer. Assistant Chief Education Officer (Technical Vocational Unit)
Dr. Deloris Brissett Assistant Chief Education Officer (Guidance and Counselling Unit)
Mrs. Phyllis Reynolds, Assistant Chief Education Officer (Curriculum Unit)
Mrs. Freda Jones, Registrar (Independent Schools)
Mr. Dennis Morrison, Chief Architect (Architectural Section)
Mr. Delroy Alleyne Assistant Chief Education Officer (Student Assessment Unit)
Mrs. Beverley Thompson, Assistant Chief Education Officer (Professional Development Unit)
Mr. Winston Farquharson, Planner (Educational Planning Unit)
Mr. Philbert Dhyll Assistant Chief Education Officer (Tertiary Unit)
Mrs. Shirleen Greenland, Project Administrator (ROSE Secretariat)
Mr. Noel Brown, Technical Coordinator (ROSE Secretariat)
Miss Marcia Daley, Project Accountant (ROSE Secretariat)

Preparation assistance:

A PHRD Grant in the amounts of US$300,021 was approved for project preparation. The Grant finances six studies and five consultative workshops. The studies and their authors are presented below.

Bank staff who worked on the project included:

Name	Speciality
World BankTeam:	
Kin Bing Wu	Task Team Leader
William Experton	Caribbean Sector Leader
Marlaine Lockheed	Monitoring and Evaluation
Peter Moock	Bursaries for Private School Places
Toby Linden	School Improvement Planning
Karla McEvoy	Environmental Assessment
Rajeev Kumar Swami & Daniel Boyce	Financial Management Assessment
Marcelo Osorio	Procurement Assessment
Janet Cupidon-Quallo	Social Assessment (NGOs, Counseling, Maroons)
Yang-ro Yoon	Economic Analysis and TVET
G. F. Brest van Kempen	Architect
Lorraine Blank	Implementation Manual
Maria Elena Anderson	School Improvement Planning Manual
Aracelly Woodall	Program Assistant/Costab
Julie Nannucci	Program Assistant
Eduardo Brito & J. Augusto Carvalho	Legal Agreement
Edward Daoud	Disbursements
Participant on secondment from the Korean Ministry of Education: Gwang-jo Kim	Institutional Analysis and Tertiary Education in Jamaica
Participant from the Economic Commission for Latin American and the Caribbean: Beverly Carlson	Social Assessment (School Culture and Teaching and Learning)
PHRD Grant funded Studies:	
Stephen Barro and Wesley Van Riel	Design of Funding Formula
Vanus James and Colin Williams	Assessment of the Impact of Cost Sharing
Ricardo Valderrama & Ewan Million	School-based Management Assessment -- Financial Management
Jorge Cavero and Winston Anderson	School-based Management Assessment -- Procurement
Kirsten Busch and Monica Brown	On-line, Distance Education for Teacher Training
Carol Dwyer and Loretta Anderson	National and Regional Secondary Level Examinations and ROSE II
William Jack and Robert Wynter	Feasibility study of restructuring of teacher salaries
Marion Blake	Facilitator of Consultative Workshops

Ruby Royer World Bank Peer Reviewers: Elizabeth King (DECRG) Jacob Bregman (AFTH3) Christopher Thomas (EASHD) External Peer Reviewer: Patricia Anderson (University of the West Indies	Facilitator of Consultative Workshops

Annex 8: Documents in the Project File*
JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II

A. Project Implementation Plan

Project Operational Manual

Project Financial Management Manual

Project Procurement Manual

School Improvement Planning Manual

B. Bank Staff Assessments

Institutional Assessment

Financial Assessment

Procurement Assessment

Social Assessment

Environmental Assessment

C. Other

Blank, Lorraine. Youth-at-Risk in Jamaica. (Draft) December 2000

Caribbean Examination Council, Statistical Bulletin, 2001. Barbados, 2001.

Kim, Gwang-jo, Tertiary Education in Jamaica: Trends and Policy Issues for Development. (Draft) June 2002.

MOEYC, Jamaica Education Statistics, Kingston, various years.

MOEYC, ROSE 2 School Layouts, Kingston, September 2001

MOEYC, Education: The Way Upward. A Path for Jamaica's Education at the Start of the New Millennium. Kingston, February 2001

MOFP, Estimates of Expenditure. Kingston, various years.

NEPA documents for review of proposed projects

PIOJ, Jamaica Survey of Living Conditions. Kingston, various years.

PIOJ, Economic and Social Survey Jamaica 2001.

Statistical Institue of Jamaica. The Labor Force Survey. Kingston, various years.

World Bank, Jamaica Secondary Education (in 2 volumes). Grey Cover Report No. 19069-JM. Washington, D. C. December, 1999.

World Bank, Country Assistance Strategy. Report No. 24689-JM. Washington, D. C., September, 2002.

World Bank, Country Assistance Strategy. Report No. 21187-JM. Wasington, D. C. November, 2002.

Yoon, Yang-Ro, Technical and Vocational Education and Training (TVET) in Jamaica. (Draft) October, 2001.

*Including electronic files

Annex 9: Statement of Loans and Credits

JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II

09-Aug-2002

Project ID	FY	Purpose	Original Amount in US$ Millions IBRD	IDA	Cancel.	Undisb.	Difference between expected and actual disbursements* Orig	Frm Rev'd
P074641	2002	2ndAPL_JM:HIV/AIDS PREV.AND CONTROL DO	15.00	0.00	0.00	15.00	0.00	0 00
P067774	2002	JM- Social Safety Net Project	40.00	0.00	0.00	38.60	-1.40	0.00
P007490	1997	JM PUB SCTR MODERNIZ	28.40	0.00	0.00	10.34	10 34	10 34
		Total:	83 40	0.00	0.00	63.94	8.94	10.34

JAMAICA
STATEMENT OF IFC's
Held and Disbursed Portfolio
Jun 30 - 2002
In Millions US Dollars

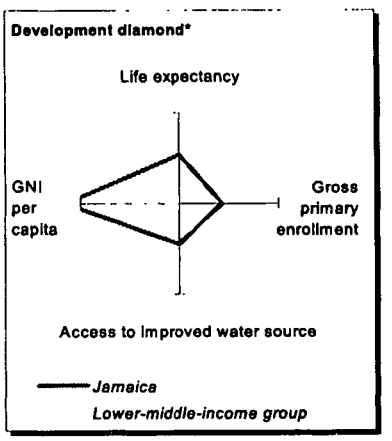
		Committed IFC				Disbursed IFC			
FY Approval	Company	Loan	Equity	Quasi	Partic	Loan	Equity	Quasi	Partic
1995	Jam Energy Prtnr	13.72	0.00	0.00	30.50	13.72	0.00	0.00	30.50
2002	MBJA Limited	20.00	0.00	0.00	25.00	0.00	0.00	0.00	0.00
2001/02	Mossel	12.00	8.00	0.00	0.00	12.00	8.00	0.00	0.00
	Total Portfolio:	45.72	8.00	0.00	55.50	25.72	8.00	0.00	30.50

		Approvals Pending Commitment			
FY Approval	Company	Loan	Equity	Quasi	Partic
	Total Pending Commitment:	0.00	0.00	0.00	0.00

Annex 10: Country at a Glance

JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II

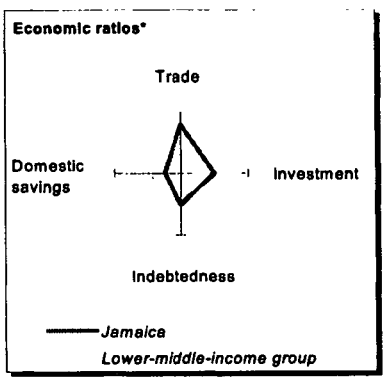
POVERTY and SOCIAL	Jamaica	Latin America & Carib.	Lower-middle-income
2000			
Population, mid-year *(millions)*	2.6	516	2,046
GNI per capita *(Atlas method, US$)*	2,630	3,680	1,140
GNI *(Atlas method, US$ billions)*	6.9	1,895	2,327
Average annual growth, 1994-00			
Population *(%)*	0.8	1.6	1.0
Labor force *(%)*	1.4	2.3	1.3
Most recent estimate (latest year available, 1994-00)			
Poverty *(% of population below national poverty line)*	..	..	..
Urban population *(% of total population)*	56	75	42
Life expectancy at birth *(years)*	75	70	69
Infant mortality *(per 1,000 live births)*	20	30	32
Child malnutrition *(% of children under 5)*	4	9	11
Access to an improved water source *(% of population)*	71	85	80
Illiteracy *(% of population age 15+)*	13	12	15
Gross primary enrollment *(% of school-age population)*	100	113	114
Male	100	..	116
Female	99	..	114



KEY ECONOMIC RATIOS and LONG-TERM TRENDS

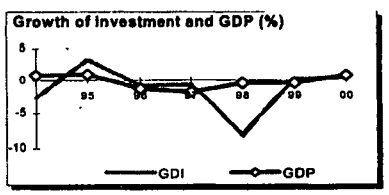
	1980	1990	1999	2000
GDP *(US$ billions)*	2.7	4.2	7.2	7.4
Gross domestic investment/GDP	15.9	27.9	25.6	26.8
Exports of goods and services/GDP	51.1	52.0	42.0	44.1
Gross domestic savings/GDP	15.9	23.8	15.6	15.8
Gross national savings/GDP	10.8	18.2	20.0	20.8
Current account balance/GDP	-5.2	-7.7	-3.4	-4.8
Interest payments/GDP	4.6	4.8	4.5	2.5
Total debt/GDP	72.1	110.3	54.6	57.8
Total debt service/exports	19.6	28.4	20 2	16.5
Present value of debt/GDP	..	..	54.1	..
Present value of debt/exports	..	..	106.9	..

	1980-90	1990-00	1999	2000	2000-04
(average annual growth)					
GDP	2.0	0.5	-0.4	0.8	1.8
GDP per capita	0.8	-0.4	-1.3	-0.1	1.1
Exports of goods and services	5.4	0.3	0.2	4.4	4.2

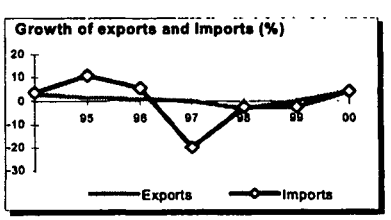


STRUCTURE of the ECONOMY

	1980	1990	1999	2000
(% of GDP)				
Agriculture	8.2	6.5	7.0	6.5
Industry	38.3	43 2	30.8	31.3
Manufacturing	16.6	19.5	13.5	13.4
Services	53.5	50.4	62.2	62.2
Private consumption	63.8	62.2	67.5	67.9
General government consumption	20.2	14 0	16.9	16.2
Imports of goods and services	51.0	56.1	52.0	55.1



	1980-90	1990-00	1999	2000
(average annual growth)				
Agriculture	0.6	1.9	1.3	-11.2
Industry	2.4	-0.5	-0.3	0.2
Manufacturing	2.7	-1.9	-0.9	0.7
Services	1.8	1.1	-0.8	3.0
Private consumption	4.3	-1.1	-2.6	2.7
General government consumption	6.2	2.7	-2.6	-2.1
Gross domestic investment	-0.1	4.4	0.1	0.4
Imports of goods and services	9.2	1.1	-2.4	4.3

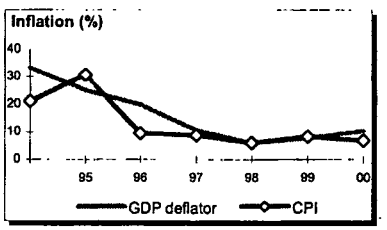


Note: 2000 data are preliminary estimates.

* The diamonds show four key indicators in the country (in bold) compared with its income-group average. If data are missing, the diamond will be incomplete.

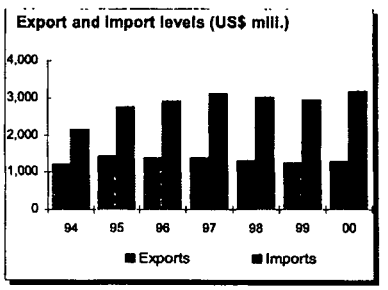
PRICES and GOVERNMENT FINANCE

	1980	1990	1999	2000
Domestic prices				
(% change)				
Consumer prices	27.0	22.0	8.4	6.9
Implicit GDP deflator	18.3	23.7	7.7	10.6
Government finance				
(% of GDP, includes current grants)				
Current revenue	24.7	30.4	30.4	31.0
Current budget balance	..	5.9	-2.4	1.1
Overall surplus/deficit	-15.5	2.6	-4.3	-1.0



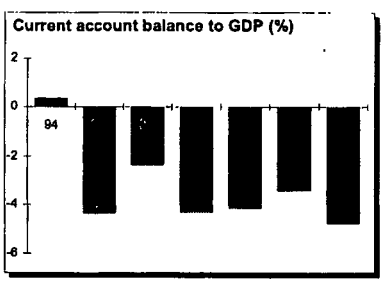
TRADE

	1980	1990	1999	2000
(US$ millions)				
Total exports (fob)	963	1,157	1,247	1,293
Alumina	537	625	627	744
Bauxite	198	103	56	46
Manufactures	57	71	42	49
Total imports (cif)	1,170	1,850	2,960	3,192
Food	72	126	274	263
Fuel and energy	447	404	416	585
Capital goods	198	580	.470	509
Export price index *(1995=100)*	52	86	113	118
Import price index *(1995=100)*	52	86	113	117
Terms of trade *(1995=100)*	100	100	100	101



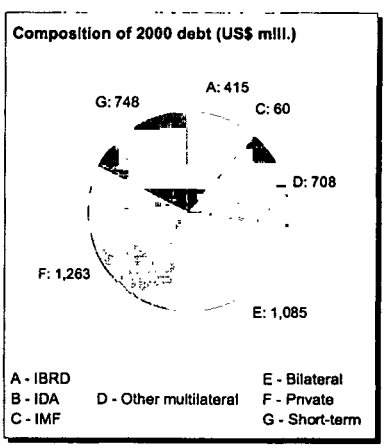
BALANCE of PAYMENTS

	1980	1990	1999	2000
(US$ millions)				
Exports of goods and services	1,369	2,247	3,367	3,250
Imports of goods and services	1,368	2,340	3,928	3,973
Resource balance	1	-93	-562	-723
Net income	-229	-506	-333	-410
Net current transfers	91	271	649	780
Current account balance	-138	-328	-245	-353
Financing items (net)	58	408	123	643
Changes in net reserves	79	-80	122	-290
Memo:				
Reserves including gold *(US$ millions)*	..	..	801	1,082
Conversion rate *(DEC, local/US$)*	1.8	7.2	40.1	43.3



EXTERNAL DEBT and RESOURCE FLOWS

	1980	1990	1999	2000
(US$ millions)				
Total debt outstanding and disbursed	1,913	4,674	3,913	4,279
IBRD	176	672	393	415
IDA	0	0	0	0
Total debt service	280	662	732	577
IBRD	18	120	99	83
IDA	0	0	0	0
Composition of net resource flows				
Official grants	13	117	24	..
Official creditors	280	41	-104	29
Private creditors	-19	-46	-99	442
Foreign direct investment	28	138	524	..
Portfolio equity	0	0	0	..
World Bank program				
Commitments	0	60	0	75
Disbursements	55	35	64	98
Principal repayments	6	62	75	61
Net flows	50	-27	-11	37
Interest payments	13	58	24	22
Net transfers	37	-85	-35	15



Additional Annex 11: The Education System
JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II

The Ministry of Education, Youth and Culture (MOEYC) has overall responsibility for early childhood education, primary, secondary and tertiary education, although universities are autonomous. The MOEYC exercises its oversight through six regional offices for 14 parishes.

Secondary education is considered a transition stage with the dual mandates of preparing adolescents for the world of work and of equipping the academically inclined for the pursuit of tertiary education. These two mandates have segmented seven years of secondary education into three cycles with different entry requirements and exit points. In the recent past, the secondary curriculum was divided into various tracks -- (a) academic, (b) mixed academic and technical, (c) mixed academic and vocational, and (d) prevocational. This multi-track system was the British legacy which provided a classical/academic education for the elite and a vocational bent for the majority. (Table 11.1).

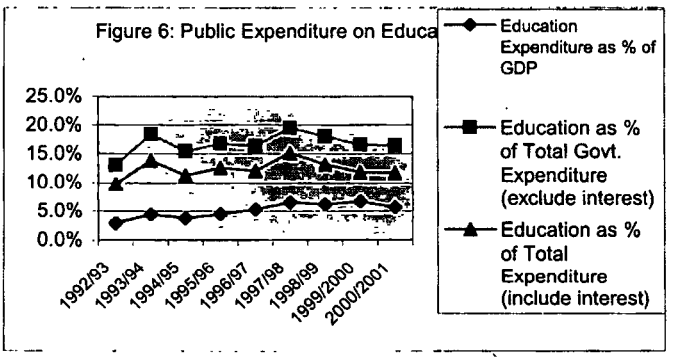
Table 11.1: Secondary Education by School Type, 2000/2001

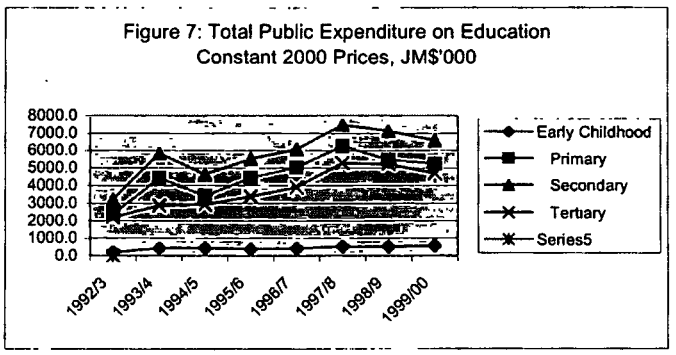
Grades offered	Old School Types	# of Schools	Enrollment	Current Pupil: Teacher Ratio	MOE&C Guidelines ' Pupil: Teacher Ratio	New School Types
7 to 9	All-Ages	353	14,998	23:1	35:1	All-Age
7 to 9	Primary and Junior Highs (upgraded from All-Ages)	89	20,526	19:1	30:1	Primary & Junior High
7 to 11	Comprehensive Highs (upgraded in 2001)	75	77,913	19:1	25:1	Both now known as High Schools (135) with total enrollment
7 to 11/13	Secondary Highs (traditional, academic)	59	89,185	17:1	20:1	Of 174,093 and a pupil/teacher ratio of 25:1
7 to 11 or 9 -11	Technical Highs (mixed academic & technical, vocational)	14				Technical Highs
10 to 11 or 12	Vocational and Agricultural Highs	3	498	10:1	25:1	Vocational & Agricultural Highs
Various	Independent Schools	70	Na	n.a.		Independent Schools

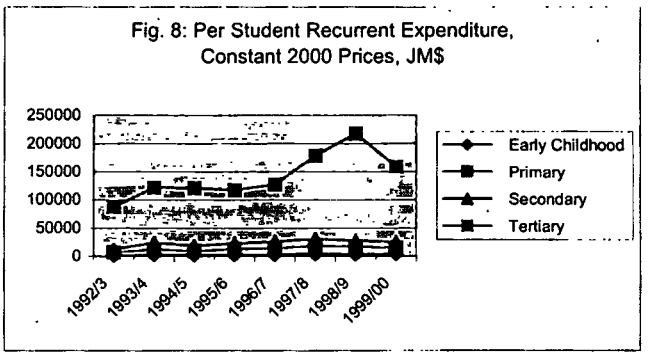
Source: MOE&C statistics.

Education Finance

Public expenditure on education constitutes the most important source of education finance, rising from 2.9 percent to 7.6 percent of the Gross Domestic Product (GDP) between 1992/3 and 1999/00 (Figure 6). This level is higher than the average of 4.6 percent in the Latin American and the Caribbean Region, and higher than countries of similar income level. The rising level of public expenditure on education in the 1990s was mainly due to negative growth of the economy while government spending and deficit have continued to increase, as well as to increase in real terms of teachers' salaries. Between 1992/3 and 1999/00, budgetary allocation to education has fluctuated between 9.8 percent and 12.6 percent of total government spending when debt servicing was included. Excluding interest payment of public debt, education expenditure ranged 13 and 19.5 percent over the same period (Figure 6).







Between 1992/3 and 1999/00, the MOEYC's recurrent expenditure on early childhood education has increased from 2.2 to 3.2 percent and that on primary education from 28 to 27 percent, while

recurrent spending on secondary education declined from 36 to 34 percent, and that on tertiary education remained constant around 26-27 percent. Recurrent expenditure on special education, adult education, and library services remained unchanged around 1.3, 0.3 and 1.3 percent. Recurrent expenditure on central and regional administration and common services (such as student assessment) increased from 5 to 6.4 percent over the same period. Expenditure on nutrition fluctuated between 1.4 and 3 percent.

Per student recurrent expenditure increased in real terms over the same period: more than double in primary education and secondary education, respectively, and by 79 percent in tertiary education. This is made possible due not only to increase in public expenditure but also a decline in school-age population, particularly at the primary level. In 1999/00, per student recurrent spending amounted to US$85 in early childhood education, US$313 in primary education, US$1,925 in special education, US$533 in secondary education, and US$3,284 in tertiary education.

Secondary education accounted for the largest share of total education spending, amounting to 34 percent in 1999/00. Within secondary education, the average public allocation to various types of school differ. Within secondary education, per student spending varies across school types: US$338 in the junior high level in All-Age and Primary and Junior High schools, US$515 in upgraded Secondary Highs, US$590 in traditional secondary highs, and US$744 in Technical and Agricultural/Vocational Highs.

Given the constraints of public resources, to improve quality, expand access and pursue reform requires raising funds from both external borrowing and introduction of cost sharing in Comprehensive Highs and Secondary Highs in 1993/4 and to raise tuition fees at tertiary education institutions in 1996/7. External funding amounted to 7 to 10 percent of total public expenditure on education. Tuition fees account for an additional 14 percent of the total public spending on secondary education and about 20 percent at the University of the West Indies. Tuition fees are not chargeable in primary schools, All-age, and P&JHs. There are compensatory payments from the MOEYC to all high schools where students cannot pay fees. Table 11.2 below shows that different types of schools offering secondary education has received different types of grants from GOJ to provide education services. Given that All-Age and Primary and Junior Highs do not charge fees, they also have the least discretionary resources for improvement. Consideration to equalize education finance across school types is one of the rationale behind the provision of the school improvement grants in ROSE II.

Table 11.2: Types of Education Expenditures Covered by Different Grants to Different School Types					
Accounts Opened by Schools	Expenditure type	All-Age Schools	Primary and Junior High Schools	Upgraded High Schools	Traditional High Schools
Grants	Operation	X			
Subvention	Operation		X		
	Admin & ancillary staff salaries		X	X	
Subvention	Maintenance & Operation		X		
	Admin & ancillary staff Salaries			X	
Fees	Instructional materials, utilities			X	X
Subvention	Admin. ancil. staff teacher salaries				X
Fees	Instructional materials, utilities			X	X
Bursar			X	X	X

Additional Annex 12: Institutional Analysis
JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II

I. Institutional Management Capacity of the MOEYC and the Regional offices

Education Policies and Strategies. The MOEYC sets out its education policies and strategies in the White Paper for the Year 2001 and the Corporate Plan 2001-04. The education sector strategy is well expressed in terms of vision, objectives, targets, indicators, key projects, and major priorities. In the White Paper, the policy goals are stated in the seven strategic objectives that encompass a wide range of activities from 'literacy for all' to 'use of ICT in education'. The objectives are then translated into operational measures and targets, strategies, and corporate actions (outputs) in the Corporate Plan. These are largely shared and understood by the officials of the MOEYC (Ministry of Education, Youth and Culture) and of its ROs (Regional Offices).

Despite the impressive plans, several questions could be raised regarding the linkage between policy needs, planning and implementation. First, it appears that education sector strategy is very much confined within the sector, and as such it is unclear how the education policies will serve socio, economic and political needs of Jamaican society. The plans draw attention to a rising trend of primary students and attempt to retain these students in the formal school system while maintaining a desirable pupil-teacher ratio over time. Yet they are not linked to the macroeconomic realities and do not address the issue of, for example, what Jamaican schools could do to better prepare youngsters for an economy which has been deteriorating over the last ten years. Second, the issue of feasibility is not adequately assessed in the plans. The plans do not provide a realistic evaluation of the extent to which the current system of governance and resource allocation is prepared for the implementation of the stated objectives within the planning time frame (2001-2004). The target date is Dec. 2002 and so far only 6 schools are without computers which they will get by the target date Further, although the Corporate Plan tries to clarify how and by whom the progress will be monitored internally, it is unclear how the general public will be informed of the progress to make judgments about the system performance hence ensure external accountability.

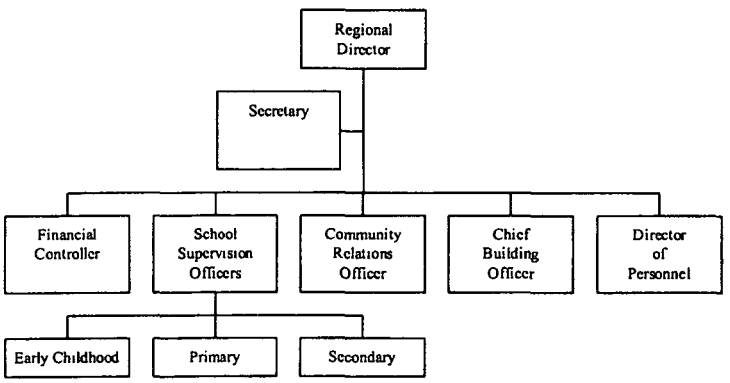
Organizational Structures of the MOEYC and the ROs. The MOEYC is in charge of provision of education as well as portfolios of youth and culture. The educational administration is carried out by the Ministry along with a number of statutory bodies, agencies and various Boards of Management appointed by the Minister for each public education agency. The education functions of the MOEYC are organized around five major functions, i.e., educational services, planning and development, human resource management, project management and technical services, and financial management. Issues pertaining to sub sectors of education (i.e., early childhood education, primary education and secondary education) are being taken care of by the Chief Education Officer (CEO), the head of the educational services division. The MOEYC has created post for early childhood education who reports to the CEO, primary education and secondary education report to the DCEO, a recently created post. As an attempt to strengthen the corporate planning and monitoring capacity, the Ministry has also decided to create a Strategic Reform Division (SRD) under the permanent secretary. (See the Organization Chart in the main text of the PAD).(There is no MOEYC Chart in text, only for the Regional Offices)

Compared to an alternative format of the Ministry organized around sub-sectors (e.g., primary unit, secondary unit), this type of organization could provide more specialized and integrated services such as text book delivery, and examination administration. However, the administrative arrangement may not help to adequately address sector-wide issues such as lifelong learning, vocational education and education reform. (Vocational education is addressed under Educational Services and in the Regional

Offices. For example, the divisions in the Ministry are primarily concerned with primary and secondary school education while vocational training for out of school population is under the jurisdiction of the HEART/NTA, a statutory body that reports directly to the Minister. Also notable is that substantial units of the MOEYC are devoted to direct service delivery (e.g., acquisition and allocation of school resources) rather than planning and monitoring, an indicative of centralization. (There are units that are involved in planning and monitoring In this vein, it could be a right move to create a Strategic Reform Division that will be responsible for cross cutting issues more effectively while not duplicating the function of the existing planning units.

The ROs are responsible for K-12 school supervision, school personnel services and school maintenance. Each regional office is headed by a regional director who reports to the deputy CEO in charge of regional offices in the central Ministry. The ROs are uniformly organized around two main functions: managerial/support functions (personnel, financial, building officers) and professional education support functions. Some functions such as supervision and training are overlapping with the MOEYC without clear role division. Other daily operational functions are carried out without sufficient authority. For example, decisions pertaining to teacher's salary, leave and travel are not made by the ROs but by the central Ministry. In this regard, it is encouraging that the MOEYC has recently begun to provide each region with a J$1 –J$1.5 million emergency repair fund. Dependency on central decisions appears to leave little incentives for the REOs to be held accountable for the quality and relevancy of their own services. Delegation of authority is needed for a timely, creative, flexible and spontaneous solutions to various problems.

Organization Structure of Regional Offices



Human Resource Capacity. The MOEYC is currently employing more than 900 regular staff and 200 project staff. Of the senior managers, the majority will be retiring within next 3-5 years. Considering senior managers' extended job tenure, their retirement could mean a significant loss to the MOEYC and need special attention. It appears rare for middle managers to act on behalf of their bosses hence they have less opportunities to upgrade their managerial and leadership skills while on the job. Junior officials in the Ministry seems to be lacking some rudimentary managerial skills such as planning, data management/interpretation and ICT. This all could mean a capacity gap between senior and junior staff. While the staff size at the MOEYC is substantially large, skill composition could be an issue as there are less technical staff than needed. The MOEYC does not have a long-term systematic plan to upgrade skill levels of the MOEYC staff except for a succession plan to replace retiring directors.

Each regional office employs 50-60 staff including administrators and education officers. Compared to the MOEYC, there is evidence of understaffing at regional level. For instance, each education officer supervises as many as 20-30 schools. One possible solution would be to have education officers of the central Ministry deployed at the regional offices. All the directors and education officers of the ROs are recruited from educators such as principals and senior teachers. The managerial and support staff are recruited from people with some tertiary level qualification including first and second degrees (division heads) and people with CXC (Caribbean Examination Council) 4+ credentials (clerical and assistant staff). Skill/capacity gap is also observed at regional level between senior and junior staff. Opportunities for training are scarce for regional staff in general and for support/administrative staff in particular. Basic ICT skills for computer applications are most often acquired through self learning.

The current practice of open recruitment for senior posts may increase competition hence provide pressure to junior staff to improve their performance. It would be more so if the open recruitment is somewhat linked to performance measures in a transparent, fair and relevant manner. Notwithstanding the manifestation of the targets and indicators for educational attainment in the White Paper and the Corporate Plan, there are no clearly defined performance indicators for administration and management at both the MOEYC and the ROs.

Management, Communication and Information Infrastructure. The MOEYC with donor contributions has already made some progress towards improving managerial capacity. These include the installation of the School Census, and the EMIS at the central Ministry, and distribution of computers to regional offices and schools. Nevertheless, the capacity of quality decision making and management is severely limited due to lack of appropriate infrastructure for communication and information processing. Information flows mainly through face to face contacts such as meetings and workshops within the MOEYC and between the MOEYC and the ROs. For a given month, regional directors have to travel to Kingston for 4-5 days. Moreover, the regional offices have difficulties in contacting principals and schools under their jurisdiction on a daily basis. 15 primary schools in the Region I can not be accessed without a four-wheel drive vehicle. 81 of 145 primary and secondary schools in the Region III can not be reached with telephones. This is troublesome because a RO is the link between the schools and communities, and the central Ministry, and communication is key to its proper function.

Senior officers including regional directors are apparently overloaded with decisions (MOEYC directors), and routine queries and meetings (regional directors). Delegation of authority to middle managers and junior staff seems rare. There is also evidence of coordination problems which could lead to a duplication of effort. Taken together, there is much to be gained through both vertical and horizontal coordination and integration.

At present, most jobs at both the MOEYC and the ROs are carried out manually. Typical examples are works related to teachers' personnel records, teachers' payroll, and accounting services. Coupled with lack of delegation of responsibilities and authority, this makes it difficult for regional offices to respond more efficiently to the budgetary and management needs of principals and schools. Evidently, there is a large room for cost-saving through investment in telecommunication infrastructure. Staff time could be better utilized to provide technical services to schools and principals. (This is being treated under the PESP Project)

The MOEYC has launched various initiatives to upgrade its information infrastructure. The MOEYC has (from the mid 1990's)developed an EMIS system for the school census with a server, and 34 workstations connected to the server in the Planning and Development Division. However, the MIS is

not integrated with other systems in the MOEYC, and not linked to the ROs and schools. As such the School Census data for example are not collected electronically but manually. This causes the time gap between the collection and reporting of data. Lack of accurate timely data makes it impossible to inform budget preparations and other important decisions. As of now, all members of the Planning and Development Division have the access to information stored on the EMIS. At the ROs, no MIS is set in place with only a few stand alone PCs which are used to compile school census data and some crude DBs (e.g., school personnel) for regional directors. Even worse, the existing ICT facilities are not fully utilized due to lack of training and technical support. In sum, management capacity is severely limited due to lack of coordination, integration of ICT into work process and poor quality of infrastructure . The PESP project is to establish a WAN for the central offices and the regional offices which will include databases for personnel(including schools) and infrastructure which will be developed under the project. The school census and Student Assessment database and the will be linked to the WAN. It is planned to increase the staff in the MIS Unit and tointoduce IT staff in the six Regional Offices.

Table 12:1: ICT Infrastructure of the MOEYC and the ROs

Descriptions	MOEYC	RO
LAN	5 Separate LANs: MIS unit, Personnel Unit, Media Service Unit, Projects Unit,Student Assessment Unit	No LAN
MIS & DB	GOJ: HRMIS, FMIS * School Census, Special Education, Tertiary, School Personnel Caenwood: School Administration System, National Assessment , Early Childhood Education database	No EMIS No DBs
# Technical Staff	4 in the MIS unit,2 in Media Services Unit and 1 in Student Assessment	None
# Computers	34 Workstations connected to the EMIS +	6-7 PCs/RO
Webpages	http://www.moeyc.gov.jm	Being constructed

Source: 1) MOEYC, MIS Unit.
2) Educational Management Information System (Final Report of the PESP, MOEYC & IDB, 2000)
Note: The Office of the Office of the Services Commission operates the HRMIS(Human Resource Management Information System)and the Ministry of Finance is responsible for FMIS(Financial Management Information System).

II. Ongoing Projects for Institutional Strengthening

Current initiatives to strengthen institutions fall into three key areas: decentralization of decision making and management, professional development and integration of ICT into management. Table 12.2 below summarizes various donor initiatives to improve institutional capacity.

Table 12:2: Major Components of Institutional Strengthening of Various Donor Projects

Projects	PESP (IDB, 2000-2005)	New Horizons (USAID, 1998-2004)	DfID's CDI, JAASP (2000-2004) and others
Decision making & Management	Pilot School District Board of Management, Site-based Management & Governance in 12 "Lighthouse Schools"	School Based Reform and Development Plan	Support Strategic Planning by Creating a Strategic Reform Division under Permanent Secretary (DfID)
Training & Professional Development	Support for the Succession Plan of the MOEYC Management Training for Regional Officers Diploma Programs for 800 Primary School Principals	Teacher Training in Literacy & Numeracy	In-service Training for Untrained Teachers (JAASP) 1 consultant for 2 ROs (JAASP)
ICT & Management Information System (MIS)	EMISConnect: web-enabled personnel, finance & infrastructure DBs linked to School Census ICT Training & LAN/ WAN infrastructure	School Census Networking of Schools, ROs and the MOEYC 3 PCs to each RO	2PCs /RO (JAASP) 300 PCs to Sec. Schools, 20 PCs to MOEYC (Government of China)

Source: 1) Corporate Plan 2001-2004 (MOEYC, 2000), http://www.moeyc.gov.jm
2) Various Project Documents of the PESP (IDB, 2000)

As for the decentralization projects, the MOEYC is currently experimenting and plans to pilot two similar but different decentralization projects as described in the table below.

These are the Cluster Board Form of School Management (GOJ initiative); and an IDB proposed project for Pilot School District Board of Management. While the move towards decentralization is generally consistent with the GOJ's vision and commitment, caution may be needed for extending the concept of school board beyond individual schools because 1) representation of schools could not be easily attained; and 2) it may require extra resources which could otherwise be used to strengthen the existing regional offices.

The training programs are mainly targeted at primary school principals and teachers, and senior managers at the MOEYC. Attention should be brought to the training need of junior and regional offices to bring about bottom-up changes. The ICT initiatives are being implemented without sufficient coordination, and have resulted in a fragmented system in which each system serves its own purpose. All in all, donor impact is yet to be seen in all three areas.

Table 12:3: Comparison of Broad-based Board of Management

Descriptions	Cluster Board Form of School Management (GOJ, since 1998-1999)	Pilot School District Board of Management (IDB, conceptualization stage)
Rationale/Major Concern	Dearth of qualified persons for School Boards, collaboration among schools	Effective deployment of teachers, improving financial management
Pilot Sites	Greater Portmore, St. Ann (Region III) Claremont, St. Catherine (Region VI)	Two pilot districts (one rural, one urban) in Region VI in St Catherine and Clarendon.
Number of Schools	6 Schools. in Greater Portmore (4 Primary, 2 Upgraded Highs) 5 Schools In Claremont (4 All Age, 1 High)	One district consists of 25-30 schools up to 15,000 students
Organization Structure	11 members including Chairman, and Representatives of Government, Principals, PTAs, a past student association, students, academic staff &communities No secretariat, no support staff	Supported by a superintendent of the district education office appointed by the MOEYC Chief Financial Officer Other Staff: reallocation of the staff of the MOEYC or regional offices and schools Will have two school boards for schools instead of 46.
Key Functions	Financial Management: determine ceilings of expenditure at school committee level, appoint procurement and finance committees, etc. Personnel Management: appoint vice principals, approve vacation leave, etc.	Administer and manage educational affairs eg procurement, staff recruitment Supervision and control over schools Provide & maintain school facilities, etc. Employ teachers, and administrative staff and allow for shared educational services for specialized educational services especially in small schools. Determine school attendance policies Develop its own operating/capital budget

Source: 1) MOEYC, Deputy CEO.
2) A Pilot Study of the Cluster Board Form of School Management (National Council on Education,2000)
3) PESP Jamaica Institutional Strengthening Component (MOEYC & IDB, 2000)

III. Conclusions and Next Steps

On the basis of the preceding analysis, the following conclusions can be drawn:

(1) despite the progress that the MOEYC has made toward strengthening its capacity for planning and policy making at the central Ministry, there is room for improvement by linking the education sector strategies to macroeconomic policies;

(2) both the MOEYC and the ROs need reforms of, and changes in their coordination structure as well as work process;

(3) human resources need to be upskilled and better utilized through training and systematic long-term staff development plans; and

(4) management infrastructure in general, and MIS and ICT in particular should be updated and integrated to maximize the use of the existing infrastructure.

Looking ahead, the following could be considered as components of institutional strengthening in the ROSE II.

Technical assistance to support the MOEYC's commitment to transfer responsibilities from the MOEYC to the ROs. The areas of activities are: (1) to determine an appropriate level of distribution of authority between senior and middle managers in the central Ministry, and between the center and the region in the area of overlap (a quick survey on the state of internal delegation of authority, role differentiation between individual units and officials, and the extent of decentralization to assess the types and modes of decisions made at both the MOEYC and the ROs); and (2) to evaluate operating procedures, job requirements, staff's preparedness for their jobs, and training need for generic skills such as project preparation/ management/ monitoring, and ICT skills.

Provision of opportunities for professional development and training in core managerial/professional skill areas. Needed skills are in data management, ICT literacy, project management, curriculum guidance, and student assessment. Target group is middle managers and junior staff at both the MOEYC and the ROs. Training could be provided through international workshop and study tour, and short modular courses in partnership with various training providers (UWI, teacher's colleges, UTECH., Heart/NTA).

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These areas will complement other on-going projects' institutional strengthening components, for example, DFID's technical assistance in the development of performance indicators to support MOEYC's Corporate Plan, and PESP's support to improve ICT and transport for regional offices.

Provision of strategically critical infrastructure to meet the transportation and communication needs of regional offices such as telephones and 4 wheel drive vehicles. Technical assistance could also be provided to have an effective and accurate assessment of technical capabilities including the MIS (H/W, S/W &DBs, network), connectivity and technical manpower. (This is being done with PESP support.)

Development of performance indicators to support the MOEYC's commitment to performance management as stated in the Corporate Plan. Indicators will be developed in key management/service areas such as: 1) distribution of textbooks; 2) collection of school census and other critical data; 3) disbursement of budgeted funds; and 4) delivery of supervisory/technical services to principals and schools. (This will be done with DFID technical assistance.)

Provision of opportunities for professional development and training in core

managerial/professional skill areas. Needed skills are skills in data management, ICT literacy, project management, curriculum guidance, and student assessment. Target group is middle managers and junior staff at both the MOEYC and the ROs. Training could be provided through international workshop and study tour, and short modular courses in partnership with various training providers (UWI, teacher's colleges, UTECH, Heart/NTA).

Additional Annex 13: Social Assessment
JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II

Social and economic situation

Jamaica is one of the poorest countries in the Latin American and Caribbean region. Only 7 of the 32 countries in the region are poorer—Bolivia, Cuba, Ecuador, Guyana, Haiti, Honduras and Nicaragua. Jamaica is currently undergoing a recession and its GNP annual growth rate throughout the nineties was the second lowest in the region with only Haiti doing worse (comparable estimates are not available for Cuba).

Yet it has pre-primary and primary enrollment ratios that come close to matching the best countries in the region. Furthermore it has a household income distribution that is by far the most equitable of any country in the region. In facing the challenge to find ways to expand access to upper secondary education while improving the equity and quality of secondary education with particular reference to the poorest populations, these two positive characteristics of the country might serve as strategic starting points.

There is a very positive attitude to schooling by households-families and government. Enrollment rates are very high in primary education (97%) and still comparatively high in the years immediately prior to upper secondary education (78%). No country in the region with a population of over one million spends more than Jamaica on education from public sources as a percentage of total government expenditure. No country at all in the region spends more overall on education as a percentage of GDP than Jamaica. Only Brazil, Costa Rica and Cuba in the region are spending more than Jamaica from government funds per secondary pupil as a percentage of GNP per capita. No country in the region is spending more than Jamaica from government funds per tertiary student as a percentage of GNP per capita. In Jamaica, education is seen as a public good to be sought and supported to the extent possible.

On the equity and distributional aspect, Jamaica's comparatively equitable income distribution is an anomaly in a region that has the most inequitable income distribution in the world. Jamaica's income distribution is much closer to that of the United Kingdom than to that of any country in the Latin American and Caribbean region. Also, Jamaica has no major ethnic, language or religious divisions like Trinidad, nor has it sustained the historical divide between the descendants of the colonizers and the descendants of the colonized like Mexico.

Jamaica has a male-dominated social value structure. Domestic violence and child abuse are not uncommon. It has a high rate of juvenile crime, particularly in inner city and low income areas, considerable unplanned teenage fertility, child-shifting (nearly 20%), particularly in rural areas, and a very destabilizing pattern of single female parent families which is very disadvantageous especially for providing the necessary support to and supervision of children as they grow up and try to become educated. Many children have one or both of their parents working permanently abroad, providing financial but not nurturing or educational support.

Jamaica shares with almost all countries in the region a major socioeconomic division between the rural and the urban population. This is very important for education reform because the 44% of the population that live in rural areas in Jamaica account for nearly 80% of its total poor. In fact, the geographical distribution of poverty is even more concentrated with the four parishes of St. Andrew, St. Mary, Westmoreland and St. Ann accounting for half of Jamaica's poor.

Education situation

The educational structure is historically highly stratified and remains so in spite of policy interventions in the 1990s to reduce stratification. At the end of primary education (grade 6) students are tracked into different types of secondary schools of clearly different levels of quality. Children of poor families in the rural areas and the inner cities receive a low quality education that the high enrollment rates mask. It is here that the problem of school dropout in the later years of secondary education begins, with poor quality teaching and poor attendance. This particularly affects young boys. Girls score better and stay on longer at school. This is in contrast to the male-dominated social pattern.

The secondary school structure adds to the urban-rural division. Secondary departments in All-Age and Primary and Junior High Schools, which account for 16% of secondary school enrollments, do not currently go beyond grade 9 and thus do not offer upper secondary education. A large percentage of these schools are small rural schools. Universal enrollment is maintained up to age 11 and net enrollment is still nearly 80% by the age of 14. Age 14 is equivalent to grade 9 i.e. the end of the first cycle of secondary education and the highest grade offered by all secondary schools. It is after this point that there is a quick fall in enrollment, partly due to the lack of upper secondary school facilities insomuch as some 35,000 pupils are currently attending schools that do not go beyond grade 9. It is estimated that 11,000 grade 9 graduates, with a large proportion coming from poorer families, do not have places in grade 10. This is particularly problematic for rural schools with small catchment populations.

Another reason for the swift drop-off in upper secondary enrollment, which begins slowly at the lower secondary level, is the lack of motivation to stay on in school and the various costs and foregone earnings involved. This particularly affects lower secondary pupils from poorer families. Pupils from richer families usually continue to grade 11 but for the poorer students the drop-off begins after grade 9. So upper secondary places need to be made more available and, in particular, accessible to and affordable by children of poorer families, and secondary education needs to be made more relevant and more attractive so that poorer pupils will want to stay on.

Another important objective is to improve the quality of secondary education. This is more difficult to achieve than improving availability and accessibility, particularly in a country that has been suffering from a recession for more than ten years. Examination performance has not been very good throughout the education system and improvement for the poorer students in such circumstances is likely to be slow.

By far the most serious problem is students' reading abilities. Deficient reading starts in the lower primary grades and continues to build, year-on-year. Poor reading abilities are concentrated among boys. By the time students reach grade 6, 30 percent of students read below their grade level. By grade 9 a huge divide has occurred--large numbers of students, especially boys, cannot read or write, some are functionally illiterate. Because of their reading deficiency, they cannot learn the content of various subjects. This is the tremendous paradox of Jamaican education that standard statistics do not reveal--high enrollment rates through lower secondary but low learning, interest and participation. These factors add up to a huge challenge to secondary education which must correct for these incapacitating deficiencies among a large segment of most school populations while trying to provide a quality education to students who are ready. According to Hyacinth Evans' social analysis, "...boys and girls enter grade 1 in equal numbers and with roughly the same kinds of experiences and skills, though we know nothing about their attitudes to school work at this age. ...By the time they reached Grade 5 and 6, major distinctions were detectable in their attitude to and interest in work, the quality of work which they produced and in the academic performance...In many of the schools, the streaming decisions made at the grade 3 and 4 level influenced the students' CEE chances for the remainder of the primary years. By

Grade 5 boys were over-represented in the low streams according to the reports of the teachers (and to the pre-appraisal mission) ... we conclude that the primary school contributes to this differential socialization"

To sum up, the desired social development outcomes of the project are to extend access and participation in upper secondary education of children from poorer families, to reduce the dropout of children from poorer families, to improve the quality of the secondary education that they receive while at the same time providing remedial education to a large segment of the intake, and to raise their performance levels in standardized examinations so that all students can reach the standard. To illustrate the challenge, one only has to look at the student performance in the CXC General Proficiency exam in secondary high schools. In June 2001, for example, in ten secondary schools (two of which were visited during the assessment), only 10% or less of eligible students passed the mathematics exam while at the top end, in one school (also visited) 98% of the students passed. Of course part of this is due to the stratification of the student intake but a good component is due to the quality of the education offered by the institution. In a fourth school, having a 60% pass rate (also visited), the school principal was proud to point out that their 'top girl' came from a very poor background yet had received nine distinctions.

Youth at risk

Youth at risk is a key social issue. International experience indicates that one of the best ways to address the problems of youth-at-risk is to keep adolescents in school and to improve their academic performance. The project objectives are directly related to these goals. Poor academic performance, violence in schools and increasing teenage pregnancy – all are risk factors for youth to be addressed. Inequalities in access and the high attrition rate among students from the poorest quintiles are other key social issues that will be addressed by the project.

In order to improve the cognitive skills of the secondary school-age population it is necessary to understand the many factors that block children from taking full advantage of educational opportunities. International research in some 32 countries has shown that the most important factor in student achievement is not the level of resources provided to schools; it is how students use them. Students' use of school resources is more strongly associated with students' economic, social and cultural status than any other school variable. Less advantaged students do not tend to use school resources as regularly as students of higher socioeconomic status do. Socially advantaged students do not necessarily get more resources, they use them more.

What this tells us is that socially disadvantaged students need more attention than socially more advantaged students to prosper in school and yet it is these very same students that face increasing barriers as they progress through the school system. Why is this so and what are these barriers that build up like a high brick wall that stands between pupils and their school opportunities?

Academic tracking by school type has been, in effect, stratification by socioeconomic background. In 2000, 43% of students in All-Age schools belonged to the poorest quintile and as many as 73% from the two bottom quintiles, while only 3% of the top quintile attended these schools. On the other hand, over half of the students in the traditional, academic Secondary Highs were from the top two quintiles.

Many students, and especially boys, simply cannot read, or read sufficiently well, to prosper when they enter secondary school. By the end of the primary cycle about 30% of Grade 6 students are functionally illiterate. These students tend to be those that come from low socioeconomic backgrounds and have other "youth-at-risk" factors. It means that they are at an instant disadvantage in many other subjects as well as language and reading and unless they receive focused attention to help them catch up,

they fall further and further behind and eventually leave the school system before completing secondary. This creates a permanent barrier to a productive life, causing low self-esteem, leading to dependence and possibly inappropriate adult behaviors. Low reading achievement is probably the biggest risk factor that the secondary education system and the youth in society face. Children start to fall behind in the early grades and their reading deficiencies need to be identified early on to prevent them from growing steadily worse. Educators and students throughout Jamaica know this and readily identify sub-standard reading as the most serious risk factor that the education system must tackle at both the primary and secondary levels. There are efforts to address this at the primary level through a number of interventions such as: a grade 1 readiness inventory; diagnostic test at grade 3; grade 4 literacy test; summer classes to assist students performing at unacceptable reading levels and non-promotion to grade 5 if summer classes have not resulted in acceptable reading levels. At the secondary level, foundation textbooks have been developed and distributed to students in grades 7, 8 and 9 reading below their grade levels.

In large part the severe reading gap of poorer students is further widened by the very fact that poverty keeps youth at a disadvantage. How is this so? Students do not have the money to pay for travel to school on a consistent basis. As more places have been made available in comprehensive and secondary high schools, students and parents are wanting to take advantage of this opportunity and travel further to school, involving more time and more cost. This is a deep widespread problem in all educational regions. It results in poorer students not being able to afford to attend school every day. According to educators if students can afford bus fares only three days per week they would still rather attend schools that are "perceived" to be more prestigious, i.e. the high schools as opposed to the All-age schools. As well as travel costs, there are book costs, uniform costs, school fees, lunch money, special assessments, costs associated with extra-curricular activities, As a consequence, students from lower socioeconomic backgrounds tend more often to not have any textbooks, or not all of them, often despite the availability of cost sharing arrangements which a substantial number of students do not take advantage of.

A further risk factor is that a very high number of students live with only one parent, almost always the mother, and not infrequently live with neither parent, often because one or both parents have migrated for work, being left in the care of grandmothers, aunts, sisters, brothers, or others. The impact of this incomplete family environment is yet another stress factor on students and may well be a pressure on older children to start working.

Finding a place to study may be hard as well with cramped living conditions and cramped school conditions which themselves are presenting additional barriers to educability, especially of socially disadvantaged students. Secondary schools and departments are not able to keep up with the demand for places. Many schools are way, way beyond their capacities and holding two shifts and still taking on more students. It is not uncommon for pupil-teacher ratios to exceed 40, 45 or 50 in certain classes in locations such as Mandeville, Montego Bay, and certain areas of the North Coast. Space is the problem most often singled out by educators and students alike. Classrooms are so few that two classes (each exceeding 40 students) occupy the same classroom so in effect the student-classroom ratio is 80 in single shifts. Not a whole lot of learning can go on in this circumstance, one which is especially acute along the north coast of Jamaica where many are migrating for work and for access to secondary education.

Throughout the country, and in Kingston, especially, the risk factors are even more acute. "Urban terrorism", to quote the Security Minister, Dr. Peter Phillips, whose root cause is the illegal drug trade, accounted for 1,138 persons killed last year, the highest in the Caribbean, with Jamaica being one of the largest drug trans-shipment points in the region. High schools do not always have enough students because of fear of violence from gangs and political boundaries that cannot be crossed without high risk of physical danger. Many have already dropped out and live on the street or are among the unemployed:

46% of youth between the ages of 14 and 19 and 30% of youth between the ages of 20 and 24 are unemployed. 30% of all births are to teenage girls and teenage fertility rates are increasing. The number of reported new HIV infections in adolescents has doubled each year since 1995. Over half of all major crimes are committed by youth (mostly males and 30% of inmates sentenced to adult correctional facilities are between the ages of 17 and 24). Preventing students from leaving school early and giving them the necessary support to prosper in school and be engaged by it are very important ways of keeping youth out of risk.

Anatomy of a school at risk: A Primary and Junior High School in the Hills above Montego Bay has a tremendous challenge to bring the 50% of its students which its principal estimates are reading at sub-standard levels up to grade level. Overcrowding and large class size are a huge problem. This Primary and Junior High School, with its 1,568 students in a physical plant with a capacity of 645 students, is bursting at the seams. It was forced to move to a double shift and the shift system has provided a "blow" to extra-curricular activities, according to its principal. 4th grade classes average 50 students and some classes reach 60 and more. Sometimes already large classes share a room with more than 80 students in the same room. The crush of students is such that there is permanent noise (classrooms are open to the outside) and a great deal of loitering, kids coming to school late, restlessness, etc. It is a physically unappetizing school plant located on a dusty, busy road in the hills above Montego Bay.

Many students come from the nearby squatter communities whose parents cannot afford the school fees, uniform costs, transportation costs, and attendance is very low (60%) on Fridays because many students do not have the money to pay for transportation to school. When it rains, even a little, attendance is always low, said the principal. This may in part be due to the lack of a "holding facility" for the next shift as they arrive at school because they have no place to wait that is covered from the rain. Nevertheless, he asserts that "the set of children doing well will always be here, rain or shine". Tardiness is a daily problem for a large number of students and incentives to arrive early haven't worked so far since the "exam classes", the principal's term for the top stream at grade 6 and 5, are the ones that always win because they are motivated to come to school to prepare themselves for the exams in order to continue their schooling in the best school possible, according to the principal. This is not surprising: the 'exam students' are the 'elite' in the school who have been selected as the ones that merit special preparation (to score highly on the Grade Six Achievement Exams exams). Conversely the remainder of the students receive less attention and know they are not in this elect group and this knowledge lowers their self-esteem and their will to work. They know they are the "slow set", a term heard frequently and used frequently by principals, teachers, and students themselves.

Since the introduction of the GSAT exam at grade 6 to select better performing students into high school, many principals take the view that the GSAT is creaming off their best students who are headed for secondary schools while leaving them with the lower achievers. Rather than see this as a positive development, leading to better opportunities for their better students, and taking the pressure off large junior high classes, allowing for more attention to these needier students, they see it as a loss to their schools. Principals also express the view that parents are selecting schools based on the perception that schools closer to town are better schools, perceptions coming often from their children who hear this from their friends. It is hard to know whether this perception is a reality in terms of achievement since the achievement test results are not available to the public. What it has led to is a great student population pressure on some schools while the rural schools are losing students. Students and parents are choosing these schools over nearby schools and are willing to have their children only attend some days of the week (as long as the money holds out) because they think it gives their children a better education or

social advantage even taking into account the financial hardship.

Overcrowded schools like this Montego Bay Junior High School must compress the school day in order to accommodate two shifts, start early and expect their students to virtually attend back-to-back classes in order to cram in the necessary number of hours of class time to meet government standards (5.5 hours). Students on the morning shift start school before 8 am when public transportation is not always available that early, thus children arrive at school late. Students don't seem to be concerned about tardiness. Like other double shift schools visited, all lacked a play area. All would benefit from paving a space for play which would have a tremendous cost-benefit for giving students a place to exercise within the school compound. And this space could be covered with an aluminum open roof to provide a dry place for kids when it rains. A Rural High School in the Mandeville parish, which authorities said was one of the poorest schools in the region, had paved its play area and it was being used extensively by students running and playing. Enquiry was made as to the cost which was just over US$ 4,000.

Another chronic concern for secondary schools is the need to raise funds to make needed repairs and improvements, to equip the library and to construct the hard porch for play. They need to equip their school so as to provide more classes in 'practical' areas where students can gain experience in order to prepare them for jobs later on. The Primary and Junior High Schools have tried to raise funds in a number of ways, for example, by getting adopted by a company like other schools have done, but so far they have had no luck.

On the positive side the Montego Bay area junior high school principal asserts that his teachers are still highly motivated, caring teachers who work hard and are taking advantage of opportunities to upgrade their skills and pursue university training which is very generous: two years of study leave with one year of full pay. The paradox is that students at the same time are deprived of the books they need, often cannot afford to come to school, do not have proper classroom facilities or sufficient teacher time nor extracurricular activities or sports. There is a need to redress this imbalance and a funded School Improvement-School Development plan is a good way to do this.

What have we learned from schools, students, principals, teachers and parents?

The reality of school reform is played out in schools, classrooms and at home by students, teachers, administrators and parents. These are the actors who know first hand about the barriers and challenges of schooling and learning in Jamaican schools. They are a tremendous source of relevant information and ideas about the problems faced in getting a good education as well as being a source of innovation and experience in how they have coped with problems and have overcome them and introduced creative solutions. An important part of the design of ROSE II is drawing from discussions with students, principals, teachers, and regional education authorities. Their views and recommendations are central inputs in the design of the focus of ROSE II and its implementation. These actors have an ongoing role to play in participating in decisions about project objectives, activities, and inputs, as well as desired outcomes. The project is structured to ensure the continuing participation of these key actors. During project design and pre-appraisal All-age, Primary and Junior High, former Comprehensive High Schools and Traditional High Schools were visited and discussions held with these schools in all six regions. Meetings were held with each of the six Regional Education Offices and their supervisory staff. Consultations were held in each regional office with teachers, principals, parents. As well, intensive consultations were held with some 15 to 20 students coming from 5 to 10 schools at each of the Regional Offices.

Voices of students: from problems to solutions

Students, being the beneficiaries of education, are the actors in the best position to assess the education they are getting. The student consultations identified what they see as the important problems that need correction. They also shared creative, innovative ideas and doable practices for enhancing education. Students are a great untapped resource for providing ideas on what they want from education, what excites them and what to do about it. They should be active participants in the ROSE II process.

The majority of students that were consulted are leaders in their schools: student council presidents, head girls, head boys, prefects, for example, they represent their peers and also regularly work with school administrators and are in a good position to have an overview of their schools. These students demonstrated remarkable maturity and judgment.

For students in Region 4 (Montego Bay) streaming is the major problem holding back student achievement. They characterize streaming as "destructive". The streaming of students into classes according to their performance on GSAT scores, or tests designed and evaluated by the school itself, highly stratifies students into classes of children of purportedly similar learning capacity. Although Jamaican education policy states that streaming is not to be practiced it is, in fact, an almost universal practice that is deeply engrained. Streaming was observed in every school visited to the extreme extent of 6 to 7 individual streams according to "ability". Students once in a given stream stay in that stream throughout their secondary school years, an enormous disincentive to better performance. Everybody in the school knows who is in which stream and they know what that means about expectations for their performance and their futures. Although students in principle are supposed to be able to elect to take the CXC exam should they choose to, the top students in a Montego Bay High School stated that students not in the CXC stream were not permitted to do so. They felt that students in lower streams were stigmatized and should have more opportunity, for example in being offered as many subjects as the top stream. They suggested that students wanting to take the exam should be tested to see if they are improving even if they aren't in the "CXC" stream. Students also thought that counselling should encourage students to risk the challenge. Streaming was a concern mentioned in numerous other regions and schools as well.

Some schools have creative programs to help prepare their students for the working world. For example, mock job interviews where students dress up and business people come in to interview them and give feedback on their manner, their resumés, and their dress. They take field trips to observe work settings, have rap sessions and watch training videos, etc. These activities complement the three week work experiences in hotels and factories, etc. and all help to prepare students for successfully getting jobs. And they are doable in any school with a little preparation.

Computers: Students all want access to computers. They understand that computer literacy is a key competency for success. Computers excite them and allow them to pursue active learning, explore, problem-solve. They feel it is a key part of their secondary education and students in lower grades feel they should have equal access to limited computers in their schools where computers are currently reserved for upper classmen preparing for the CXC exams. Students made the correct assessment that more than a couple of years exposure would be necessary for them to pass the CXC.

Students want more "practical" subjects and equipment: visual arts, equipped science labs, a music room, home and family management, industrial arts. They feel that students need more types of outlets for their skills and interests. It was truly astonishing to realize what is possible with creative teaching and sensitivity to students. The remarkable innate artistic talent of students in Rural High School in the Parish of Manchester, a school that is counted among the more disadvantaged schools, has been brought out by one first-class creative art teacher. In just four months he has involved all grades, 7

though 11, in his art classes and students are producing professional quality art works. When the team arrived to visit the school, the teacher was outside, surrounded by students watching him paint a large mural on one of the school buildings, the first of many he planned. He had fashioned a small cubicle into a studio where his students' work was proudly displayed, representing many art forms he had taught them with low cost or no cost materials: charcoal, colored pencils airbrush techniques using a simple toothbrush, cutouts, stencils. Each student had constructed his own portfolio, in itself a work of art made from simple cardboard and decorated. One student had already started a money-making project stenciling t-shirts and selling them. The school was set to compete in the Chamber of Commerce scholarship competition. The art teacher is a beacon for this Rural High school, a living statement of what it is possible to achieve with ingenuity, talent, discipline and little cost.

Students were adamant that expelling should be abolished because it destroyed a student's future. They felt that more counseling was needed and ways to get already expelled kids back in school. Ways of preventing behaviors that lead to expulsion were discussed, especially the roles that fellow students can play and are playing such as student councils and peer counsellors and prefects. It is interesting to note that when these views and proposals were shared with their principals and teachers these authorities had the exact opposite view: that these students deserved what they got. The Ministry's new PASS (Programme for Alternative Student Support) which is intended to provide an opportunity for these students to modify their behavior and complete their education without further interruption is an important step forward and should be made widely available as soon as possible.

An innovative, simple idea for building positive strengthening relationships has been designed by students at a high school in the 5th region and it could easily be done anywhere. The problem arose from the large size of the class. Students proposed to their form teacher that they split the class into groups of 6 to 8 students, each student would pick a name for itself, a positive name, and function as a friendship-support group for each other for at least a year. Each group would set its mutual goals and rules, carry out projects. One group chose to call themselves "The Tapanauris Family" a local term meaning to always stay on top and not settle for anything below that.

Students talked a lot about what they called "the big family input" in student outcomes, support and building self esteem. Many students find it hard to communicate with their parents about their problems--parents don't want to be bothered and don't listen for various reasons. Apparently this is a widespread problem and one that leads to youth looking outside to other role models, frequently bad influences. How to cope with this? Aside from peer counselling in schools other solutions proposed (and being done) were youth leaders giving talks to parents at church, at school, for example on parents day, and going out to workplaces to talk with employers about problems children are facing and the need for employers to take into account that their parents had child care responsibilities that sometimes competed with work responsibilities.

Teachers. There was a very serious divide between schools where students respected and embraced their teachers, giving them much credit for their school success and very sad cases where students felt let down, disappointed, taken advantage of by their teachers. In one high school students comments were: teachers are totally negative; they show favoritism to some students; they fight students (specific examples provided and confirmed by others present); they talk down to students; they lock themselves in the teachers' room and chat, etc, etc. In this same school students complained that they had no access to their library since there was no librarian and the books in the library could not be checked out. Students from another high school in the parish that were present in the same meeting said they loved their teachers. What is this second school doing right? Discussions were held with the principal and teacher present at the meeting who were happy to share their experiences. It is a large, two shift high school with a large teaching staff. It is recommended that ROSE II follow this up, meet with the teachers,

students and principal and ask them to document how they have developed this climate of mutual trust and respect.

Good practices in Jamaican Schools

When it found that 60% of its intake had GSATs below their standard, a Girls' Traditional High School in Kingston gave them extra classes to bring them up to par and even to repeat an additional year but it paid off and most went on. A special class addressed problems of self-esteem and motivated students to better their performance. The weaker ones were given fewer subjects and the best teachers. The top girl is from a very poor background and has 9 distinctions which shows that the poorest child can come to that school and learn well. "Students appraise their teachers" according to the principal which has been useful for adjusting their teaching styles. The school has a very clear 'behavior policy' and each student has the local High School for Girls Student Handbook which sets the standards. Students receive a 'homework grade' for every subject. The principal's recommendation for ROSE II is to test students beginning at grade 2 and not wait until grade 4 in order to improve reading as early as possible. High school teachers are not trained to bring students from illiterate and semi-literate reading to grade levels.

The principal of a recently upgraded Primary and Junior High School in Kingston parish places great emphasis on reading at all levels and tests his students at the end of each term to evaluate their reading competencies and make mid- course corrections. He stated that he has specialist reading teachers who develop other teachers. He uses the MICO instrument.

When consulted by the social assessment team, the students of another Traditional High School in Kingston stated they would be interested to serve as peer counselors in other schools and the principal and Board supports this idea, provided that security could be guaranteed to the students. At this school, counseling classes are referred to as 'personal development classes'. One innovation is 'career week'. Students have a sense of pride in their school that is built on traditions and standards. This idea could be applied anywhere in school with good leadership and discipline.

The active, energetic principal of a High School in Buff Bay has upgraded the science lab and brought in a lab assistant, introduced the CXC in first form, emphasizes English in order to compete, and is setting a higher standard for the school. Many students suffer from having one or both of their parents living abroad. Her view about low reading is that there has been a social contract: teachers don't expect too much and students don't have to do too much in return.

The Vice-Principal at a High School in Browns Town introduced an innovative "Parent Involvement and Student Achievement" programme. Parents gave their time free, supervising classes when teachers were absent (since the school had no substitute teachers) or planning for known absences, for example for training courses (another occasion when students are not being taught. It would be useful to conduct a study to find out how often teachers are absent for various reasons.) The program was very effective but unfortunately it had to be discontinued due to lack of funds to pay parents for their travel which after many months became too much for them. This type of program could become part of the School Development-School Improvement plan in future by setting up a modest revolving fund to pay the parents' modest out-of-pocket expenses to allow them to continue giving their time to the school.

Everyone recognizes the important role of guidance counsellors. Many Primary and All-Age schools don't yet have a guidance counsellor but more counsellors are being assigned to high schools to keep up with their increasing enrollment. The impression from school visits was that in general guidance counsellors are under-utilized and their roles need to be redefined to provide more relevant support to students, especially students at risk. A good development is the very recent decentralization of

supervisory officers from Kingston to each of the regional offices so that each of the six regions will have a Counselling Officer. As one of these new staff commented: "I think of myself as a student advocate; the role of guidance counsellors is to advocate for their students." This is a more appropriate modern function given the types of risk factors that students are experiencing. However, it is still true that guidance counselling is seen as a female function: no men were found among all the guidance counsellors with whom discussions were held. It is recommended that the image of guidance counselling needs a facelift and an effort to restructure the responsibilities and to attract men to the profession. This is particularly important in view of the fact that most children, and certainly most boys, do not have a male role model to look up to at home. Perhaps guidance counsellor is not the right name for the job either. Perhaps 'Student Development Officer' would have a more neutral and more positive image. Boys need a male figure they can go to confide in at school. As it stands, students refer to counselling class as "a sleeping session".

Participatory approach: How are key stakeholders participating in the project?

In conducting the ROSE II social assessment, discussions were held with representatives of some 50 schools in all six regions. These discussions and interviews targeted principals, teachers, guidance counsellors, students and parents. Discussions were also held with MOEYC Regional Directors and Guidance Officers, four NGOs, as well as out-of-school youth.

The Guidance and Counselling Unit of the MOEYC, co-operated with the social assessment initiative by conducting interviews with representatives of all critical stakeholder groups in the six regions of the Ministry to learn the perspectives of stakeholders regarding: a) the kinds of problems students face in schools and at home, why they become disengaged in school, as well as the kind of academic and extra-curricula activities which excite them; b) parents' expectations of their children and school; c) teachers' approaches to dealing with students with behavioural and academic problems; d) teachers' approaches to dealing with homework; e) Regional Offices' approaches to addressing issues of youth-at-risk, and the kind of training that would improve their effectiveness and f) the adequacy of the Guidance and Counselling system. The Unit has submitted its recommendations for the role of the Unit in the implementation of ROSE II.

How does the project involve consultations or collaboration with NGOs or other civil society organizations?

Many NGOs, faith-based organizations and civil organizations have cooperated with the education system and schools in Jamaica and youth out of school for some time. These organizations and their skills are a great resource for extending the reach of the education system and its schools, especially to deal with difficult social questions and youth at risk.

A number of NGOs and faith-based organizations, working with adolescents and youth, were consulted during the social assessment. NGOs which operate secondary educational institutions such as the Jamaica Association for the Deaf and the Salvation Army School for the Blind, as well as others which provide critical support services to secondary level students, such as the Jamaica Association for Children with Learning Disabilities, are to be consulted concerning their possible involvement in the ROSE II project.

Another group of NGOs which could become involved in the project, are those offering programmes for out-of-school youth and youth-at-risk such as the YMCA, YWCA, Youth Opportunities Unlimited, Addiction Alert and the National AIDS Committee. Some of these NGOs already have a close working relationship with the Government of Jamaica but could be engaged, as a group, through

the Council of Voluntary Social Services CVSS, the primary umbrella organization for NGOs in Jamaica.

Additionally, the project should endeavor to conduct national, broad-based stakeholder consultations on a biennial basis, as well as an end-of-project consultation, in order to keep stakeholders (civil society, business sector and international development partners) informed of new and on-going developments and to solicit their feedback regarding project outputs and outcomes. Students should be involved in the process through the National Secondary Schools' Council.

What institutional arrangements have been provided to ensure the project achieves its social development outcomes?

The institutional arrangements that would facilitate this could include:

a) The preparation of School Improvement Plans explicitly tied to improving learning outcomes, especially reading, and incorporating specific ways in which students will be assisted, especially youth at risk and students with deficient reading levels, making cost-effective simple changes in school management and school practices that are within the control and realistic budget of schools.

b) The role of the Regional Offices will be critical in linking schools with partners, providing training and exchange of experience on innovative ways to improve school performance within realistic limits of resource availability.

c) Strengthening the networking/collaborative arrangements between the MOEYC and NGOs and other civil society organizations, possibly through the establishment of a *Stakeholders' Planning and Review Committee* which would identify opportunities for joint initiatives and elaborate arrangements for utilizing such opportunities. The Stakeholders' Committee would also carry out a monitoring function and feed recommendations into the ROSE Secretariat on an ongoing basis. Secondary school students should be represented on this committee.

d) Building the capacity of the Guidance and Counseling Unit of the MOEYC to enable the division to effectively implement the Guidance and Counseling Policy which is shortly to be approved by Cabinet. To this end, it will be necessary to increase the staff of the Unit at the Centre to facilitate the training and special projects aspects of the work of the Unit.

e) Town hall meetings will be organized annually in each region for the review panel and regional officers to report to the community on the progress made in school development planning, to review whether the targets have been met, and to discuss how to move forward.

Monitoring performance in terms of social development outcomes

The monitoring of social development outcomes will necessarily need to flow from and be a subset of the overall monitoring plan. It is advisable that it makes use of readily available data already being collected and collated by schools through the Ministry's administrative data collection systems and on a national population basis using the Survey of Living Conditions through monitoring the percentage of students by income quintile enrolled in secondary and primary schools by type. Some elements that contribute to improved participation and performance are already being monitored, like enrollment rates, rates of attendance/absenteeism, and teacher qualifications, and performance on standard examinations (GSAT, CXC, etc.).

The literature on the subject suggests that poorer students in good schools with excellent facilities require special assistance to be able to effectively use these facilities if their performance is to improve. So it is important that we know as clearly and as soon as possible the ongoing outcomes of placing students in good schools so as to be able to understand how the intervention is working and then to correct on the spot those aspects that are not working as anticipated. In this way we will be not just monitoring the intervention but also improving it as we go along. Tracking these corrections will be also be a part of the monitoring process. This two-pronged approach will thus allow for the participation of key stakeholders in a continuous way.

MOEYC's guidance and counselling policy and programme

It is expected that the draft Guidance and Couselling Policy of the MOEYC, dated March 2000, will be approved by the GOJ's Human Resource Council and the Cabinet during 2002. The policy is based on the principle that guidance should be recognized as an essential and visible component of the total education programme, owned and supported by policy makers, curriculum developers, programme implementers, teachers, parents and students. The primary objectives of the policy are to highlight guidance as a social engine for curriculum development and delivery and to define the parameters of the national guidance and counselling programme.

It is evident that there is great disparity in the quality of guidance counsellors and this should be addressed. The new policy calls for the establishment of acceptable minimum qualifications for counsellors. Although most secondary schools have two counsellors, they still have not achieved a realistic ratio where most students may be assured of access to counselling services. The policy stipulates a ratio of 450 students to 1 counsellor, a significant improvement.

In spite of the provisions of the GOJ and the interventions of schools and the private sector, many children were still hungry at school, have no textbooks, need bus fares, school uniforms and other supplies. Attendance is affected by the lack or insufficiency of resources which are often the reason given by youth at risk for dropping out of school. Schools address this problem with varying levels of efficiency. The more committed, compassionate and innovative counsellors, principals and teaching staff have greater success in addressing the problems of needy students. Welfare programmes have greater success when the counsellor had a good relationship with the teaching and administrative staff and the school nurse. Also very useful is the networking with NGOs and entities such as the MICO CARE Centre. (It would appear that it is necessary to expand the services of the MICO CARE Centre, as it appears to be highly-utilized by the school system and others and has difficulty coping with the demand on its resources).

Co-ordination with the NGO sector needs to be facilitated by providing counsellors, principals and teachers, students and parents with an up-to-date directory of NGO services in written and electronic form. This could be supplied through collaboration with the Council of Voluntary Social Services. This directory would be made available to all staff in the education system at all levels beginning with the Ministry in Kingston, the Regional Offices and Officers, and all schools. Best practice School-NGO collaboration should be made available.

Enhanced coordination is needed for the Programme for Alternative Student Support (PASS) which provides special diagnostic and treatment services for maladjusted students with behavioural and discipline problems. It is recommended that the PASS methodology be adapted for use in assessing student behaviour in situations other than the presentation of maladjusted behaviour, in order to broaden

the scope of diagnostic services to the student body.

A survey conducted by Guidance Officers at the start of the school term, which sought the opinion of 120 students randomly selected across the six regions, indicated that students felt that they had problems at home. These were problems which could and do impact on student behaviour at school. They included -- not getting along with siblings and other family members; no place or opportunity to study without disturbance; not getting along with parents; not being trusted; and exclusion from decision-making.

The survey further indicated that students lost interest in school because they felt that they were -- not accepted by teachers; inferior or less capable than other students; not dealt with fairly and not reading at their Grade level.

Strengthening critical aspects of school life will assist in enhancing the guidance and counselling programme. The survey conducted by Guidance Officers indicated that students identified major problems with school to include noise levels; indiscipline of students; poor attitude of students towards school; negative peer pressure; lack of understanding academic material and teachers' attitude towards students. Students were excited by school when they had good quality teachers; recreational and cultural activities; clubs and societies; the option to select the subjects of their interest (special interest was expressed in vocational subjects and computer classes) and could be proud of their school.

The findings of the survey, which was conducted to provide information for the ROSE II Social Assessment, confirmed some of the findings based on appraisal social assessment visits to several schools island-wide. It is recommended that the excellent work completed by the Guidance Officers be fully documented and shared throughout the education system.

Solving the problems identified by the Social Assessment

School Improvement Plans

The most immediate way to improve the school environment through the project is through the School Improvement Plans which are to be developed through a consultative consensus-building process involving students, teachers, parents, principals, guidance counsellors and the community. It should not be forgotten that students are critical participants in this process since they are the beneficiaries of it. The goals of the school improvement plan need to be explicitly defined in terms of student learning goals such as strategies to improve standards of achievement and personal development goals. Cost effective innovations to spark the interest and involvement of students will be especially important and the Social Assessment has described some of the current innovations that students, teachers and principals have already put in place. It is hoped that these innovations can be tapped and that their creators can be called upon in the preparation of School Improvement Plans and project initiatives. The names of these people have been duly recorded and everyone has expressed a strong interest in sharing their experiences with other schools and working with ROSE II, within and beyond their schools and regions to the benefit of secondary education for all. These innovators are principals, teachers, counsellors, and students alike.

Expanding access to upper secondary education

The Social Assessment confirmed that overcrowding, together with streaming, are the most intractable and damaging factors facing the reform of secondary education and the quality of and access to secondary and upper secondary education. The project will tackle these factors in two ways: through the construction of new schools and through public financing of private school places. The placing and

funding of students in private schools which have excess capacity is a cost effective, immediate and high quality solution that will greatly benefit students and reduce pressures on school populations in overcrowded schools. Interviews conducted during the Social Assessment with private school principals and students themselves confirmed that poor students can thrive in these conditions and can be given the additional help needed to benefit as much as possible from the educational offerings in their schools.

REPORT ON THE MAROONS

Background. Special investigations were carried out, as an integral part of the social assessment, to ensure that Maroon communities will have **equal access** to the benefits of the project.

The Maroons are the descendants of African slaves who were brought to the Caribbean during the time of the Spanish occupation of Jamaica (1494-1655). When the British captured the island in 1655, the Spaniards, before fleeing, freed their slaves who made their habitation in the deep interior of the island. The Maroons proved to be a serious challenge to British authority. In 1738, after many fierce battles, a peace treaty was signed between the British and the Maroons outlining the benefits that would accrue to the Maroon population. Some benefits included free land, exemption from paying property taxes and partial self-government. The Maroons have been regarded as freedom fighters in the long struggle against slavery. They are featured as such in Jamaican secondary school textbooks and their historical leaders are honored as "national heroes".

Today, the Maroons are located in four towns in 3 Parishes: Accompong in St. Elizabeth, Scots Hall in St. Mary, Charles Town and Moore Town in Portland, with a total estimated population of several thousand persons. Many, however, do not live in the community and are integrated into the general population or have emigrated.

There are two schools offering secondary level education within the Maroon communities – Moore Town Primary and Junior High and Accompong Primary and Junior High. There are no differences in the characteristics of these schools from other rural schools. They have the same curriculum and teacher qualification requirements. Both have been upgraded from All-Age schools to Primary and Junior High Schools, along with some 90 other schools of the same type in the second half of the 1990s. Because the school in Moore Town has been a beneficiary of British DFID's Jamaican All-Age Schools Project (JAASP), the social assessment focused on Accompong, which is also in the largest Maroon community.

Accompong, located in a deep rural area of Western Jamaica, is reputedly the foremost Maroon settlement in the country and a location of great historical significance. Like other Maroon townships in Jamaica, the community is headed by a Colonel and Deputy Colonel, who are the elected representatives of the town's residents. The town boasts a population of less than 1,000 persons. Most residents earn an income from agriculture. To a much lesser extent, tourism, commerce and Government are among the sectors which also provide income-earning opportunities. Many community members are dependent on the financial support of relatives who have migrated to First World countries.

ROSE II Consultation. Accompong Primary and Junior High, established in 1968, did much to facilitate this consultation. The principal of the school kindly arranged for the Deputy Colonel of Accompong to participate in the consultation, as well as students of the school, the President of the Parent Teachers' Association, most members of the school's teaching, administrative and ancillary staff, a community health worker and other active members of the community. Apart from some members of the small teaching staff, all those consulted (approximately 50 persons) were Maroons or residents of Accompong.

The goals of ROSE II were explained to stakeholders, as was the purpose of the consultation. Questions regarding ROSE II were posed and appropriate clarification was provided.

Background on the Accompong Primary and Junior High: The Accompong Primary and Junior High has an enrolment of 180 students and an average attendance of 172, with a fairly equal mix of males and females. Fifteen students are accommodated in a "competency shelter" (remedial class). The school reported 30% (2001), 53% (2000) and 93% (1999) of students placed in high school upon completion of the Grade Six Achievement Test (GSAT). Of the 19 students who sat the Junior High School Certificate (JHSC) examinations in 2001, 16 were awarded places in high schools. The reading competency for female students (based on the GSAT results) was higher than that of the national average, while for boys it was slightly below.

Needs of the Accompong School: *In response to a question posed to each group of stakeholders, persons cited the following as the challenges faced by the school and students --*

- Poor economically disadvantaged households (the school, as well as individual teachers assist needy students on a weekly basis)
- No Guidance Counsellor and no counselling room
- Poor attitude of some parents towards education
- Poor parent-child relationships
- Inadequate office space for the principal and the school's administrative staff
- Inadequate toilet facilities (Both students and teachers use pit latrines)
- No library (The school's stock of books are accommodated in a closet)
- No computer room facilities and equipment (The school had been told some time ago that the National Housing Trust would be assisting with the building of a computer lab)
- No Home Economics room

Students mentioned several of the above but also named the following as needs--

- A science laboratory
- More classrooms
- Tennis and netball courts
- Baseball field

Students identified the following as activities that they wished to see more of in school --

- Clubs and associations
- Drumming
- Dancing
- Speech and drama
- Agriculture
- Sewing

Impact and Benefits of ROSE I : The school reported that it had benefited from ROSE I and through that programme had acquired the following–

- A Competency Shelter (for remedial education)
- Administrative staff and equipment
- Security for the school compound

Mention was also made of the fact that the ROSE curriculum promoted the Maroon culture. Students were particularly proud to find in their textbooks pictures of persons that they recognized.

The school had expectations of receiving more, however. This included a science laboratory, guidance and counselling room, home economics room, computer laboratory and equipment, administrative offices and a library. According to the staff, professionals had visited the school and had taken measurements in order to prepare building plans but nothing had been forthcoming.

Potential support from the ROSE II programme: Stakeholders could not identify anything in the ROSE II program that might in any way adversely affect the Maroon community. They hoped to benefit from the civil works component of ROSE II, as they needed more space/facilities as indicated above under ***Needs of the Accompong School.*** They further suggested that an arrangement be arrived at whereby Accompong could share the services of a Guidance Counsellor with a school in close proximity. It was also proposed that members of the school board and other interested persons be trained to assist the teaching staff with the school's remedial teaching program.

Conclusion of the special assessment. Accompong Primary and Junior High will be a beneficiary of ROSE II, like any other Primary and Junior High Schools, from the literacy and mathematics enhancement programs, diagnostics tools and strategies to address learning problems, textbooks, and teacher training in curriculum delivery and in guidance and counselling. In addition, Accompong will participate in the School Improvement Planning (SIP) Program and receive grants based on school-generated proposals. Moore Town Primary and Junior High has already been a beneficiary of British DFID's Jamaica All-Age Schools Project. It will not be part of the SIP program. Under ROSE II, the learning outcomes of each school will be monitored, including these schools in the Maroon communities.

Additional Annex 14: School Improvement Grants
JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II

Eligibility for Participation

Participating schools are those which serve a higher proportion of students from lower consumption quintiles. These school types have been identified by the Jamaican Survey of Living Conditions. They should also not have benefited from other similar projects which provide direct funding to schools. The eligible schools will include:

- Upgraded High Schools which have not benefited from similar GOJ Projects
- Primary and Junior High Schools which have not benefited from similar GOJ Projects
- Vocational high schools
- All Age Schools which have large enrollment and have not benefited from other externally funded projects

Although there are a total of 75 upgraded High Schools, 16 of them have been upgraded during the 2001-2002 school year through the GOJ's Secondary Enhancement Programme (SEP). These schools received between JA$5 and 9 million (US$110,000 to US$200,000). Schools were required to produce a school improvement plan in order to receive funding through this initiative. These schools will therefore not need to be included in ROSE II. [The GOJ has included a further round of its SEP. If so, any schools receiving funding will not be funded from loan proceeds but will be considered as counter part funding.]

All Primary and Junior High Schools, except the two already funded through SEP, will be included in this component of the project.

Approximately 46 All-Age Schools will be included in this component of the project. The Age-All schools selected will be those which have the largest enrollments in the lower secondary grades (7-9). It is expected that all those schools with over 75 students in these grades will be included. It is estimated that this would leave about 15,000 secondary students in the remaining All-Age Schools. One hundred and twenty of these are receiving support through DFID and USAID supported projects, using a school improvement planning process. While the remaining schools are generally in the poorest and in rural areas, they will have access to support and improvement through other ROSE II interventions, such as the reading and mathematics programs and the library initiative. Including too many All Age schools in this component of the project risks spreading the additional resources too thinly and failing to make an impact. In addition, the number of students in the All-Age schools not included in the project is declining.

Technical High Schools and traditional High Schools are not included in this component. Technical High Schools are well-versed in developing and using school improvement plans and have recently received significant additional resources through the Technical High Schools Development Project, funded by the HEART Trust/National Training Authority (and JICA). Traditional High Schools are the most well-funded and highest-achieving schools in the Jamaican public system and receive students with the highest achievement and from the most affluent backgrounds. Most of them are already using schools improvement plans.

The schools involved in the SIP process will be phased in, to ensure that the mechanisms established for preparation, review and funding of the SIPs is effective. Approximately half of the schools will be included in the first year, with the remaining schools participating in the following year.

A mix of schools will be included in the first year to enable schools' experiences in school improvement planning to help others and to test the effectiveness of the SIP process with each type of school. The list of schools to be included in the first and subsequent years were agreed before effectiveness.

Activities eligible to receive funding

To ensure that ROSE II produce results on the ground and ensure success for all students, plans must seek to improve student outcomes (attendance, retention and achievement). Particular attention will be paid to how schools tackle weak basic skills (reading, writing and mathematics) and signs of student disaffection (non-attendance, tardiness, behavioral issues etc). Examples of interventions eligible for funding are as follows:

- Curricular and co-curricular activities to make learning exciting, to entice students to attend school daily, to build character, and to provide community services;
- Remedial education conducted after-school, during the weekends, holidays, and the summer to bring all students up to the same level and to make up for days lost due to weather or social unrest;
- Building up the library, instructional materials, and educational facilities in school;
- De-tracking of students within the same school;
- Parenting education/ community outreach to ensure consistent and comprehensive support to students;
- Teacher professional development to deepen subject matter knowledge and to update pedagogical practices, to keep abreast of professional trend in education and counseling related areas (including workshops, national and international conferences);
- Partnership/twinning with other schools in Jamaica or in another country to share good practice and develop joint teacher and student activities;
- Management training for principals and senior staff, especially in the use and analysis of student performance data and in financial planning and
- Refurbishment to make the school more functional, safe, and attractive.
- Student activities developed and managed by students. (Student activities will encourage active engagement by students and create innovative solutions. This approach has been tried successfully in the Bank-financed secondary education projects in Argentina and Chile.)

Civil works will not be funded.

Funding Formula

The amount of money that schools will receive to support the implementation of their SIP will be determined through a formula based on the percentage of students who scored below 30 percent correct on the grade 6 GSAT, taking into account total enrollment in the school and subject to each school receiving a minimum amount. The formula and indicative allocations to schools will be finalized before effectivenessl. In this way, resources can be more effectively targeted at lower achieving students and schools can prepare realistic SIP based on their expected allocation. Finally, this should speed up the transfer of funds to schools since the amount will be known ahead of time.

School Improvement Planning Process

There is considerable experience in Jamaica in using school improvement plans, through various initiatives: Secondary Enhancement Programme (funded by MOEYC); Technical High Schools Development Project (funded by HEART Trust/National Training Authority and JICA); Jamaica All Age

Schools Project (funded by DFID); and New Horizons (funded by USAID). The process and documentation used in the various projects has tended to converge over time, even though the last two projects are at the primary level. The School Improvement Planning process used in ROSE II will be derived from all these experiences. It is hoped that by the second cycle of school improvement plans under ROSE II a common set of materials and procedures will be in place for all school planning in Jamaica: The Bank and MOEYC will be discussing this with the other donors.

The SIP process will have several steps.

1. Orientation and training

Teams from clusters of schools (probably 5 or 6 schools of different types) will be trained together so that they can support each other while they develop their SIPs. Teams from each school will consist of those charged with developing the SIP. Schools will be required to establish a SIP Committee consisting of: the principal, a member of the teaching staff, a member of the School Board, and a parent. Other members can be co-opted, including a student.

The expertise at the workshops will come from the Regional Education Officers, the ROSE II Education Officers and from other that have been involved in the SIP process previously (such as principals, senior teachers and possibly some teachers). Resource persons would be co-opted as required.

The main training tool for the cluster workshop will be the SIP Manual. Training would focus on those aspects identified as weak in existing SIP process; especially, setting targets, and monitoring and evaluation. Training should include preparation of cash flows and work plans with activities on a quarterly basis For schools that have been through the training, in subsequent years a lighter touch will be needed, focusing on problems that emerge during the initial cycle of SIPs.

2. Consultation on and preparation of SIP

Following the cluster workshops, the school teams will return to their schools to consult widely in the school community on their SIP. The School Manual will provide comprehensive information about how to complete these SIPs. Schools will get additional assistance from other schools in their cluster and from the Regional Education Officers. Given the number of schools involved, additional technical assistance may need to be purchased.

Schools will be required to explain, in their SIP, how they consulted with staff (including non-teaching staff), parents and students.

Schools will be require to identify strategies and goals that relate to improving student performance on national assessments; they will have to cost out the plan, with price quotations, cash flow for each year. Schools will need to track intermediate indicators like student attendance. Schools already have access to student attendance and national assessment data to provide baseline statistics for their SIP.

Schools will be provided with the forms to be completed (templates included at the end of this annex). These will be provided in electronic form to schools.

Schools will produce a three year SIP, which will also identify in detail the strategies proposed to be carried out in the first year, their cost, the performance indicators for each strategy, with cash flow for the first year, and work plan which reflects the spread of work on a quarterly basis. At the beginning of each year, the cash flow for that year will be presented. Performance indicators of the previous years will

be reviewed.

3. Regional Review Panel

Schools' SIPs will be reviewed by a Regional Review Panel to ensure they are realistic, cost-effective and targeted at improving student outcomes. Detailed criteria for evaluating SIPs will be set out in the Operations and School Manuals.

The Review Panel will be chaired by the Regional Director and include a Regional Education Officer (Secondary Education), the Regional Financial Controller, a ROSE II Education Officer, and 1 school principal from another Region. Additional technical input will be sought as necessary by the Panel.

If the Panel approves a school's SIP, the Panel Chair will notify the Deputy Chief Education Officer so that funds can be disbursed to the school. If the Panel is not satisfied with the SIP, it will notify the school in writing, given the reasons for rejection. If SIP is rejected, the school will revise the plan in light of comments from the Panel and resubmit its plan. The Panel will be reconvened to review the revised plan.

4. Disbursement to and Procurement by Schools

Once its SIP is approved, a school will receive two tranches of funding that reflect the implementation schedule in the plan over the course of a year; each tranche will be the equivalent of six months' funds. Schools will make all their own purchases for goods and services, as they currently have experience doing from funds raised locally (either through school fees or fund-raising) in keeping with GOJ /World Bank procurement procedures.

5. Accountability

Schools will be held accountable for the strategies they use to improve student learning outcomes, through the performance indicators set out in the SIP. At the end of the first year, during the preparation of their SIP for the second year, schools will be required to show the progress they have made towards their targets. Funds will not be made available for the second and third years unless (a) the Regional Review Panel is satisfied with the progress the school has made in its previous year, (b) the funds for the previous year are accounted for, and (c) its proposals for the year are realistic, cost-effective and targeted.

The procedures and criteria for the operation of the Regional Review Panel will be set out in the School Manual to ensure transparency and objectivity to its operations.

6. Transfer of funds to schools

Once a school's SIP has been approved by the Regional Review Panel, the Chair of the Panel will submit a copy of the approved plan together with a request for payment of the initial tranche of money to the PCU. The first tranche will cover half a year's work plan. A check will then be sent directly from the Finance Department of the Project Management and Technical Services Division to the school, for deposit in its bank account. In the second and third years, the same cycle will be repeated.

7. Procurement by schools

All goods and services that need to be purchased to support the implementation of a school's SIP will be procured by schools themselves. While it is tempting to think that some economies of scale might be achieved through centralized purchasing, the experience of the Technical High Schools Development Plan project was that school-based purchasing resulted in significantly more efficient use of resources.

All schools, including All Age and Primary and Junior High Schools, have experience of purchasing goods and services. Upgraded High Schools currently receive a subvention from the MOEYC to pay salaries of staff and for maintenance, they collect tuition fees, and raise additional resources themselves. While All-Age Schools do not collect money in these first two ways, they do raise resources locally. The SIP process will require schools to secure at least two quotations for the goods and services they propose to purchase.

8. Audit

The current procedures for auditing schools' spending will be followed by ROSE II. In addition, a random selection of school's will be audited by internal and external auditors.

Operations Manual and other documentation

A School SIP Manual has been prepared (see Project Files)

Additional Annex 15: Bursaries for Independent School Places
JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II

The Government's White Paper of February 2001, *Education the Way Upward*, sets a target of "five years of secondary education for all students entering Grade 7 in the year 2003 and thereafter." The 2000 Survey of Living Conditions (SLC) reported close to universal enrollment in primary education, with 97 percent of 6-11 year olds enrolled. The placement rate of students who sit the Grade Six Achievement Test (GSAT) at the end of primary education is 100 percent. Nevertheless, despite the guarantee of places in lower secondary education, parents who are not satisfied with schools their children are placed in may choose not to send them there. They may find a place in a private school, or they may find a place in another public school. Public schools can reserve 5 percent of the places to exercise discretion as to whom to admit.

According to the SLC, the net enrollment ratio for 12-14 year old children falls to 78 percent. This could be due to a number of factors. First, it could be due to the definition and way of calculating the net enrollment ratio (the number of the students of a particular age enrolling in the grade designated for that age). Because of the past policy of automatic promotion, Jamaican students are promoted based on whether they have reached certain age, not on whether they have mastered the skills. Thus, the age-by-grade variation is very narrow. Between 82 to 70 percent of students in primary education are of the appropriate age and the rest are mostly one year behind. By Grade 7, because some parents do not want to send their children to the schools in which they were placed, many opt for repeating the child in grade 6 (most probably in independent schools) in order to improve their chance of being placed in a better secondary school. Net enrollment in lower secondary education of children in the richest income quintile remains at 100 percent.

An even bigger reduction in enrolment occurs after lower secondary education, since the number of government places in upper secondary is inadequate currently to absorb all of those who complete Grade 9, and the Junior High School Certificate (JHSC) examination has been used to select students for entry into Grade 10. In order for universal secondary education, the White Paper's target, to be achieved, additional places will have to be created in secondary education. The reduction in enrollments after Grade 6 and after Grade 9 would be even greater were it not for the large number of independent schools in Jamaica, many of these owned and operated by different church organizations, and many willing to take students who are failing from the public system.

Of Jamaica's 1,279 educational institutions, 283 (22 percent) are independently owned and operated. The typical private institution is, however, much smaller than the typical government institution. According to MOEYC's 2000 School Census, only about 6 percent of pre-school pupils and 10 percent of primary school pupils are enrolled in private institutions. In secondary education, private school students accounts for only 1 percent. (See Table 15.1 for the distribution of public and private (independent) schools by region.

Table 15.1. Distribution of Public and Independent Educational Institutions by Region, 2000-01

	King-ston	Saint Andr.	Saint Thom.	Port-land	Saint Mary	Saint Ann	Trel-awny	Saint James	Han-over	West-more.	Saint Eliz.	Man-chstr	Clar-endon	Saint Cath	All Jamaica
Public Educational Institutions															
Infant/Primary/Special	25	41	30	21	31	19	14	15	13	25	35	22	42	51	384
All Age	4	26	9	20	24	46	16	21	19	28	35	34	35	36	353
Primary/Junior High	3	16	4	6	7	6	2	7	3	5	5	5	11	11	91
Secondary High	12	28	4	5	6	7	5	7	3	6	9	10	15	17	134
Voc./Agr./Technical	2	1	1		2	1		1	2	1	2	1	1	2	17
Colleges/Universities		7		1		2		2			1	1	1	2	17
Total Public	***46***	***119***	***48***	***53***	***70***	***81***	***37***	***53***	***40***	***65***	***87***	***73***	***105***	***119***	***996***
Independent Educational Institutions															
KG/Preparatory/Special	5	57	5	5	1	10	3	21	5	12	5	12	6	16	163
Preparatory/Secondary	1	10		1	1	2		7	1		1	2	2	3	31
Secondary High	2	14				2		2			2	4		2	28
Voc./Agr./Business	7	21	0	1	0	3	0	8	0	4	0	1	4	12	61
Total Independent	***15***	***102***	***5***	***7***	***2***	***17***	***3***	***38***	***6***	***16***	***8***	***19***	***12***	***33***	***283***
Grand Total	**61**	**221**	**53**	**60**	**72**	**98**	**40**	**91**	**46**	**81**	**95**	**92**	**117**	**152**	**1,279**

Source: MOEYC, Planning and Development Division, Statistics Section, *Jamaica: Directory of Educational Institutions 2000-2001*.

A principal explanation for the small number of children enrolled in independent secondary schools is the difference in tuition fees between the public and private sectors. In 2000/01,under the Government's system of "cost sharing" in secondary education, the highest fees paid by some students in the government traditional High Schools (the most prestigious of the public secondary schools) was approximately JMD 8,000 (about USD 170) each academic year. The average fees for the upgraded High Schools were about JMD 4,800 (about USD 100). The least expensive (and usually of less quality) independent secondary schools charge about JMD 24,000 per year, and the most expensive ones charge up to JMD 150,000 per year – three to twelve times as much as a traditional High. For poor families, the private school fees are prohibitive. This, together with the fact that many of the public Secondary Highs have excellent reputations, makes the competition for entry into these schools very intense.

Not surprisingly, many of those admitted to the traditional Secondary High Schools come from Jamaica's wealthier homes, since these students tend to score well on the GSAT. Their high scores reflect their enriched and intellectually stimulating home environments, but also the fact that many of those who later attend public secondary schools were sent earlier to private primary level schools (known as Preparatory, or Prep, Schools) in order to give them a leg up on the placement/screening examinations at the end of primary education. Ironically, poor students, who cannot afford the high private costs of a Prep School, are sometimes left with just two choices at the end of their basic education – to drop out, or to attend one of the higher cost private secondary schools. This is well understood by all Jamaicans, and it is a troubling equity issue that MOEYC must face.

The Ministry is planning a two-pronged strategy for increasing the number of secondary level places, especially in Grades 10 and 11, at which level the enrollment ratio for children from the poorest consumption quintile is below 70 percent. The Planning and Development Division of MOEYC estimates that an additional 22,000 students will need to be enrolled in Grades 10 and 11 in order to achieve universal secondary education.

First, some new government schools will be built, and some existing government schools expanded – in areas where the out-of-school problem is most severe and where there is little excess capacity in existing (public and private) schools. Current civil works plans to be financed with support from ROSE-II call for three new government schools to be built and three existing government schools to be expanded. These interventions would add approximately 4,950 secondary school places in the public

sector.

The *second* part of the Government's two-part strategy for expanding educational access will be to enter into a new partnership with the independent schools. The idea of a public-private partnership in education is by no means a new one in Jamaica. At one time, most secondary schools in Jamaica were church owned and operated (and a smaller number owned and operated by private, non-religious companies and trusts). Over time, however, the Government expanded education in Jamaica by opening many new schools of its own. The lower fees in these subsidized, public schools put increased pressure on the independent schools, which had to struggle to cover their operating costs. Some turned to Government for help, and in the 1960s, agreements were reached with some such schools whereby the Government took over the payment of teachers' salaries and, in effect, began running these schools, using administrators assigned by the state. Ownership of the facilities, and some level of oversight, however, remained with the churches. Approximately one-third of Jamaica's 996 existing public educational institutions are housed in buildings owned by private institutions such as churches, companies and trusts, and the other two-thirds are in buildings owned, rented or leased by the Government.

The *new partnership* between Government and the private sector will be based on a different model. Rather than taking over the operation of schools that are now independent, MOEYC will provide bursaries to these schools, which will continue to be privately operated. Teachers will continue to be hired, and their salaries paid, by the private owners. Each private school will continue to enroll fee-paying students, retain its own special character, or may choose to modify it in ways acceptable to the board and attractive to potential students. However, those participating schools will accept placement from MOEYC for the excess spaces for which they are willing to accept bursaries.

The way the new partnership will work is as follows. *First*, MOEYC assesses how many additional students need to be accommodated in each Jamaican community, and how many of these can be accommodated in the government schools now serving these communities. This has been done through the annual placement at the end of GSAT and JHSC examinations. *Second*, MOEYC will advertise in the newspaper to invite independent schools in areas with a growing school-age population who cannot be placed in the public system to express an interest to participate in the scheme. An independent school cannot be forced to offer places over and above the total enrollment that the school administrators and governing board believe can be accommodated "comfortably" – that is, without changing the character of the school or lowering its quality of instruction. However, once an agreement is reached, a memorandum of understanding will be signed by which the participating schools will commit to educate students that are placed by MOEYC through the JHSC placement system. Some of these students who come from All-Age Schools may have to repeat Grade 9 before they can take on the CXC curriculum in Grades 10 and 11. The table below illustrates how the process might work.

Table 15. 2. Cost of Partnership Program Under Certain Assumptions

Variable	Value	Assumption	Who?
Independent schools offering CXC	50	MOEYC to confirm	Registrar of Inde. Schs.
Schools acceptable to MOEYC	20	MOEYC to assess	Permanent Secretary to decide
Excess capacity in G7-9	1,200	average 60 places in each school	Reg. of Inde. Schs. to confirm
Excess capacity in G10-11	800	average 40 places in each school	Reg. of Inde. Schs. to confirm
Of these, in places where needed	1,000	MOEYC to assess	Planning Department
Places to be subsidized	650	Half needs repeating G7	Minister/Permanent Secretary
Total amount of subsidy (JMD/yr)	18,200,000	JMD 28,000 per place	Minister/Permanent Secretary
-"- (USD/yr)	387,234	JMD not depreciate against USD (JMD 47 = USD 1)	
Additional revenues for schools (JMD/yr)	22,100,000	Cost sharing @ JMD 6,000 per yr	Minister/Permanent Secretary

The likely participants of this scheme are schools which are currently operating below their capacity (and below enrollment levels reached in the 1970s and 1980s) in the Montego Bay, Mandeville, Kingston and Spanish Town areas where would-be students cannot be accommodated in the public schools. The ROSE II Project will pay a bursary at a single rate to the participating schools for each student they enroll. The bursary will be the equivalent to the per student recurrent expenditure on secondary education in the public system.

This single rate bursary has the advantage of being simpler and fairer to apply, irrespective of how much the school charges its regular students. The eligible schools must *satisfy the Ministry's standards in curriculum offering, teacher qualification and physical space and safety.* The scheme is expected to give a boost to schools which are struggling to survive.

The size of the bursary paid for each new student enrolled should at least cover the school's marginal cost. Because of scale economies, however, the marginal cost will be lower than the school's average cost, which is approximated by the school's current tuition fee level. In the case of the eight independent schools visited by the World Bank mission in October/November 2001, current tuition fees ranged between JMD 24,000 and JMD 96,000, and the average tuition fee charged by these schools was JMD 45,000. It is *proposed here that Government offer a bursary of JMD 30,000 for each additional student* taken by the nation's independent schools. This is about the same as the *average unit operating cost* in public education today, and it is lower than the *total unit cost* in public education, which includes the cost of capital as well (covered by the church owners in the case of many government schools – see above). The cost comparison between the two approaches for expanding access will be discussed further below.

If a private school participates in the scheme, it will be required to accept the bursary offered by the Government (i.e., the proposed JMD 30,000) as payment for tuition fees at the school (including tuition, any 'voluntary' PTA contributions, extra-curricular activity, etc). Parents would pay any fees normally paid in public schools (such as cost sharing fees) but they should pay an average of the fees charged by the public schools in and around the area.

The *total cost to Government of the partnership program* depends on: (1) how many independent schools participate, and (2) the total number of bursaries provided in these schools. Assuming that there are 50 independent schools currently offering Grades 7-11 and following the CXC curriculum, but that only 20 of these can currently satisfy the Ministry's standards and are willing to participate in the scheme, and that the average excess capacity in these 20 schools is 60 places in Grades 7-9 but only 40 places in Grades 10 and 11, this suggests that there are 2,000 suitable secondary places in the private sector. Some of these places may not be in the communities where they are most needed, however. Assuming that half of the places are where the Ministry decides there is need, and that 65 percent of students placed are willing to go to the schools, 650 additional students can be placed in the private schools.

Some of the students, however, who will attend an independent school after finishing Grade 9 would have performed poorly on the JHSC examination. Those who have performed well in rare cases, improve their situation by transferring into one of the prestigious traditional High Schools. An estimated half of the JHSC placed students will have to repeat Grade 9 before moving to Grade 10. Therefore, the number of students that Government will provide bursaries for in private secondary schools will be 1,300.

This means that, over the five years of the ROSE-II project, the cost would amount to JMD 96 million (USD 2.0 million). Students who attend independent schools under the bursary scheme will contribute to cost-sharing in the same way as students in the public system. So, the total revenue to independent schools is not only the JMD 30,000 per students but JMD36,000, if they charge of a fee of JMD 6,000 per year, for example.

The cost of the bursaries is certainly less than would be needed for Government to accommodate the same number of additional students in (new or expanded) government secondary schools. Table 3 estimates the unit cost of secondary education in one government school that accommodates 1000 students. The approximate *construction cost* of a school of this size would be $3.0 million. The *annual cost* of the building consists, therefore, of three components – (1) the opportunity cost of the funds used for construction, (2) an amortization cost, assuming here that the building has a 30-year useful life, and (3) the cost of routine maintenance (re-painting, repairs, etc.). According to the estimates in Table 3, this amounts to $259,000 per year. The *annual operating cost* of the school comprises at least three additional components: (1) the personnel costs, (2) the cost of utilities, and (3) other non-salary recurrent costs. Table 15.3 assumes that these three components will require the following amounts annually: (1) $550,000, (2) $10,000, and (3) $180,000. It is further assumed that the last of these components (other non-salary recurrent costs) will be financed, not by Government, but by the cost sharing fees contributed by families who send their children to the school. This suggests an annual *cost to Government* of $819,000, and an annual *cost to Jamaican society* of $999,000. The annual *unit cost to Government*, assuming 1,000 students in the school, will be $819 (or JMD 40,950). Of this amount, $259 (JMD 12,950) represents the cost of capital, and $560 (JMD 28,000) represents the operating cost of the school that is borne by the Government. The proposed subsidy to private schools under the partnership program would also be JMD 30,000, which is less than 70 percent of the Government's cost if it chooses instead to build new schools.

The placement of students in independent schools will be exactly the same as placement by JHSC/GNAT – based on student/parental choice and test scores. The current placement system in GSAT as in JHSC allow families to provide three choices of schools during the registration period. Whether students will be placed in a school of their choice depends on their test scores. Most families would prefer a traditional High School. However, since these schools are highly selective, the second choice for many is an upgraded High School. The last choice for most families is an All-Age School or a Junior High School, where only 3 years of secondary education are provided and their child has to go through another placement exercise at the end of Grade 9. Because of the much higher price, a private secondary school is not affordable to many, except for those who can afford the tuition fees, or the school is perceived to be especially "good," because of high CXC (Caribbean Examination Council) results or because of its "special character" (e.g., safe environment, small class sizes, and particular values or particular religious orientation). In this scheme, the list of participating schools will be provided during registration so that they can be listed as one of the choices.

The partnership program seems to offer a real "win-win" situation. The Government will achieve its objective of getting more students into secondary education (and at a lower cost than if it were to build new classrooms), and the independent schools will be helped to operate more efficiently, at a level closer to their full capacity, which will enable them operate at a lower average cost.

Table 15. 3. Cost to Government of Building and Operating New School for 1,000 Students

	Total	Per student	
	(USD)	(USD)	(JMD)
Up-front capital cost (school construction)	***3,000,000***	***3,000***	***150,000***
Annual cost			
Capital cost, of which	***385,000***	***385***	***19,250***
Opportunity cost of capital (7.5%)	225,000	225	11,250
Amortization of school building (30 years)	100,000	100	5,000
Maintenance (2%)	60,000	60	3,000
Teachers and administrative staff, of which	***550,000***	***550***	***27,500***
Salaries (50 @ $10,000)	500,000	500	25,000
Teachers benefits (10% of salaries)	50,000	50	2,500
Utilities	***10,000***	***10***	***500***
Non-salary school inputs (student cost-sharing)	***150,000***	***150***	***7,500***
Total cost	***1,095,000***	***1,095***	***54,750***
Total cost borne by Government, of which	***945,000***	***945***	***47,250***
Capital costs	*385,000*	*385*	*19,250*
Operating costs	*560,000*	*560*	*28,000*

Additional Annex 16: Monitoring, Evaluation and Assessment
JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II

A. Monitoring and Evaluation

Monitoring and evaluation of the ROSE II project will build on existing examination, survey and evaluation capacity, in part supported through ROSE I, and will focus on quantifying the impact of ROSE II:

- On upper secondary access and achievement as measured by standardized tests administered by the MOEYC and the CXC at grades 9 and 11.
- On upper secondary access for students from households in the lowest consumption quintile as assessed through the Jamaican Survey of Living Conditions
- On the quality of secondary education as assessed through interviews, observations and focus groups undertaken by the MOEYC Evaluation Unit.

Responsibility for assembling semi-annual monitoring and evaluation reports from these various units would be assigned to the Programme Monitoring and Evaluation Unit.

Upper secondary access and achievement. Access to upper secondary education is controlled initially through placement at the end of grade six (based on performance on the grade 6 Achievement Test-GSAT). Generally, higher scoring students enter programs offering grades 7-11+, while other students enter Junior High or All Age programs offering grades 7-9. Access to senior secondary programs (grades 10-11+) for students in Junior High and All Age programs is controlled through two placement examinations administered at grade 9: (a) the Grade 9 Achievement Test (GNAT) for students in All-Age schools and (b) the Junior High School Certification examination (JHSC) for students in Primary and Junior High Schools, Upgraded High Schools and Traditional High Schools (now all designated High Schools). As these tests are standardized and equated for difficulty across forms and years, they provide suitable indicators for monitoring achievement change over time and across school types. In addition, the number of placements from these tests is a suitable indicator for monitoring access to grade 10. The project will provide support to the Student Assessment Unit to sustain these tests and to continue rationalization of the MOEYC testing and assessment, to ensure key project impact indicators are available.

Achievement at the end of upper secondary is measured by two certification examinations administered typically at grade 11: (a) the Caribbean Examinations Council Certificate of Secondary Education for students studying the CXC syllabus, and (b) the MOEYC's Secondary School Certificate for students studying the Jamaican secondary school curriculum. The shares of the relevant grade cohort (grade 11) who attain Grades 1-3 or ranges 4 and 5 in English Language and Mathematics subject tests in CXC or SSC, respectively. are suitable indicators for assessing improvements in the quality of the labor force. Grade 11 cohort data will be provided annually to monitor project impact; age cohort data will be available in conjunction with the SLC.

A special study would be commissioned on the impact of the student tuition payment scheme, which would finance additional upper secondary places on the basis of student choice and JHSC scores. One possible study design would involve placing qualified students in independent schools or public schools at random, when the student's first or second choice school is not available. Utilizing a

randomized control study design would greatly enhance the evaluation of the impact of the student "voucher" on student achievement.

Poverty focus. The Jamaican Survey of Living Conditions (SLC) provides data on children from a national sample of households. It has been proposed that in 2003, the education module would be revised slightly to aid in monitoring the impact of ROSE II on children from various household consumption quintiles; the focus would be on children in the poorest households. Proposed revisions include: (a) adding a question asking if the child has taken the JHSC, (b) adding a question about the child's first enrollment in grade 9, (c) revising a question about school completion to indicate the final grade level completed, and (d) various revisions to questions on school costs. The revised SLC data would be available after 2003 only, so SLC data from the 2001 survey will provide limited baseline indicators for children of households in various consumption quintiles.

Quality of secondary schools. The MOEYC Evaluation Unit has undertaken a number of studies of ROSE I, focusing on the qualitative aspects of the reform. These include focus group discussions with parents, teachers, administrators, school board members and students, as well as observations of classroom processes. These evaluation methodologies would be employed to assess such qualitative issues as: (a) teacher and headmaster's perceptions regarding the timeliness and quality of the technical assistance and supervision provided by the regional office in supporting the school development process, (b) regional officer's perception of the timeliness of the delivery of inputs to schools and the quality of technical advice given by the central ministry, (c) students' perceptions of the usefulness of the school development process, and (d) observations of school improvement, including classroom and school-based observations .

B. Assessment

Jamaica has long recognized that assessment can play a vital role in educational decision making. In the past, testing was valued for its role in providing seemingly objective means for allocating scarce secondary school places to all children on the basis of merit, regardless of their background. Tests such as the Common Entrance Exam were viewed as providing incentives for many primary school children to try harder and as motivating parents to support their children's efforts. With expansion of access and the availability of more school places, the role of assessment has shifted. Exams are now used for placement rather than selection and for diagnosing and tracking children's skills and instructional needs.

Significant accomplishments in improving the efficiency of the Jamaican testing system were achieved over the past decade, supported in part by ROSE I, in two ways: (a) technical improvements and (b) examination rationalization.

Technical improvements. Under ROSE I, modernization of test development, administration, and analysis processes improved efficiency. In-house capacity for test development has been upgraded. Test forms from year-to-year are equated and the psychometric properties of the test have been evaluation and validity supported. SAU officers have gained important skills in item development and vetting, item pretesting, maintaining an extensive item bank, and providing feedback to schools. The registration process was streamlined and reporting processes are being standardized. The process used to place students in grades 7 and 9 was computerized to incorporate student performance on GSAT and JHSC exams, respectively, student choice, and school space availability. The placement algorithms were developed and tested at the pilot level, parameters were refined, and the process is now fully implemented and operational. These processes would be sustained under ROSE II.

Progress in rationalization. Significant progress has been made in modernizing and streamlining the overall Jamaican testing program, with support from ROSE I. The Common Entrance Exams (CEE 11+ and CEE Technical) have been eliminated. The Grade 6 Achievement Test (GSAT) which replaced the CEE 11+ altered the nature of the exam from a purely selection test to a more curriculum-based, placement test. The Grade 9 Achievement Test is being phased out and currently All-Age school candidates from non-ROSE schools sit the mathematics and language arts sections of the Junior High School Certificate (JHSC) exam. The JHSC exam was developed as a psychometrically sound exam program that supports the ROSE curriculum and is fully implemented in ROSE school; ROSE II would continue to support this exam.

Since 1993, eighteen of the 29 Jamaican School Certificate (JSC) and two of the Secondary School Certificate (SSC) exams have been eliminated, and practical and school based components have been dropped from most of the exams. Non-academic SSC tests have not been fully replaced by the HEART/NTA (National Vocational Qualifications of Jamaica (NVQJ) level 1 certificate with the subsequent elimination of these SSC tests because many workshops do not meet the standards required for certification. The volume of the JSC examination has more than doubled since 1992, with more than 11,000 candidates taking the English and Mathematics exams, suggesting that a greater number of out of school candidates are aspiring for some form of certification. An High School Equivalency Examination is being developed by HEART Trust /NTA for out of school persons .Pilotting will begin in September2002. It is to be administered by the JAMAL Foundation.To replace the remaining JSC academic subject exams with similar JHSC exams would necessitate making ROSE syllabi and materials for these subjects available to the out-of-school test candidates. The limited availability of ROSE curriculum materials has been an issue for some time, and ROSE II could consider supporting this reform in access to materials.

Table 16.1: Summary of Jamaican Test/Examination Programs, 2002

Name	Age/ Grade	Purpose	Description	Recommendations
Grade 1 Readiness Inventory	Beginning of grade 1	Provides diagnostic information to teachers for instructional use Provides data for national monitoring	Administered by teachers who send results to MOEYC for data entry and analysis.	1. Provide support to teachers in using the results. 2. Selectively sample school results for national monitoring
Grade 3 Achievement	End of 3rd grade	Provides student achievement information Provides data for national monitoring	Administered by teachers who send results to MOEYC for data entry and analysis.	1. Shift administration to beginning of 3rd grade 2. Provide support to teachers in using results 3. Selectively sample school results

				for national monitoring
Grade 4 Literacy Test	End of Grade 4	Assesses literacy levels of children and identifies those children who are "at risk" for purposes of intervention (summer school and possible repetition)	Includes 3 subtests: Word recognition, reading comprehension, and writing; Students are classified as Not at risk, Uncertain risk, or At Risk.	1. Consider test administration date to determine if end of 4th grade is optimal 2. Consider adding category: possibly add "partial" or "minimum risk" label
Grade 6 Achievement Test (GSAT)	End of Grade 6	Placement test for secondary school programs; Provides data for national monitoring	Curriculum-based test covering maths, language, science, social studies, and communication. (mix of multiple choice and constructed response formats)	1. Alignment with new primary curriculum was done with PESP. 2. Identify sub-component for literacy monitoring
Junior High School Certificate (JHSC)	May of Grade 9	Selection/placement test for upper secondary programs for students in ROSE junior high schools; Provides achievement record/certificate for school leavers Provides data for national monitoring	Curriculum-based test covering language, maths, science, and social studies (multiple choice format) as well as Extended Writing and Resource & Technology (constructed/open response format)	1. Support continued capacity building (and better succession planning) in test development and equating. 2. Use results to monitor progress in reducing percentage of low performers. 3. Add question to registration or test form about where the candidate sat the GSAT.
Grade 9 Achievement Test (GNAT)	May of Grade 9	Selection test for senior secondary programs for All Age school	Being phased out; Currently it comprises the Math and Language sections of the JHSC exam	Eliminate

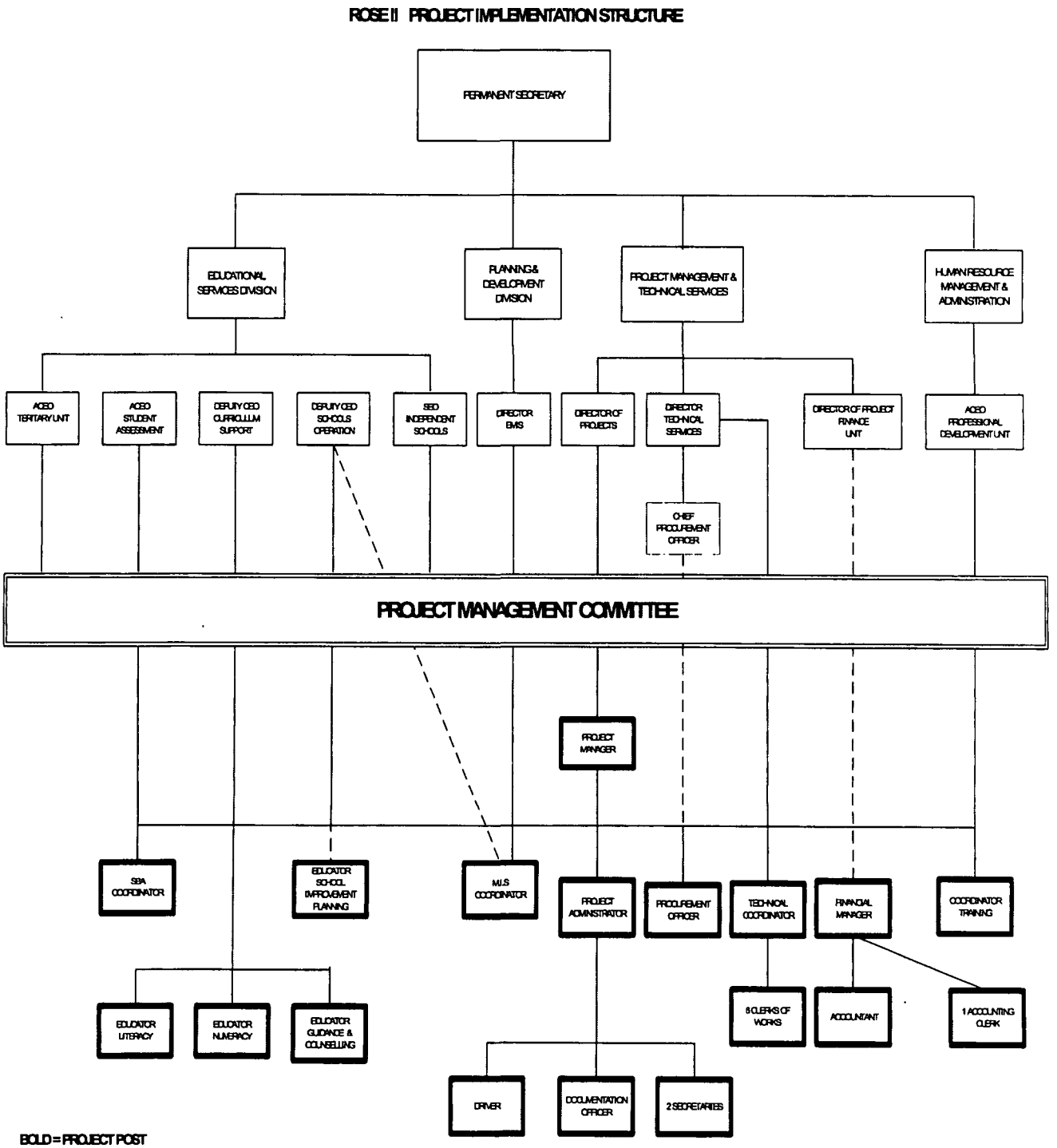
		students from non-ROSE schools		
Secondary School Certificate (SSC) Exams	End of Grade 11	National level Certification Entry to tertiary and selected civil service	Tests academic and vocational subjects; only Language and Maths have school based	1. Volume is growing consider implications 2 Review feasibility of using selected academic tests for high school equivalency 3 Eliminate low volume subject tests
CXC-Basic	End of grade 11			Phase out/CXC transitioning to modular approach
CXC-General	End of Grade 11	Regional certification Entry to tertiary	Tests academic and vocational subjects; January testing has alternative to school based; Language and Maths don't have school based	
CXC-Advanc Proficiency Examination (CAPE)	End of grade 13	Entry to University	Offers advanced level certification; candidates need not have finished grade 13.	Replaces GCE A levels
Jamaican School Certificate (JSC) Exams	Out of school	National certification for out of school candidates	Certificate exam covering academic and vocational areas. Low volume vocational tests have been eliminated.	Volume is growing Re-evaluate the potential for out of school candidates to access JHSC exam or for JSC to focus on minimum competency assessment in literacy/numeracy.

Grade 1 Readiness and Grade 3 diagnostic: These instruments have been applied nationwide every year since 1996. They are administered and scored by teachers. Subtest scores for individual students are sent to the MOEYC with approximately a 40-50% return rate. Scores received by the MOEYC are entered into a data base for potential analysis however the low return rate greatly reduces the utility of the results for national monitoring. A more efficient and sound method would be to select specific schools from whom to collect data and monitor results. Also, since the tests are intended to provide diagnostic information for teachers to use in planning instruction, the timing of the tests and support provided to teachers for using the results should be revisited.

Grade 4 Literacy Test-This test was introduced in 1999 and is administered by teachers at the end of 4th grade. It's purpose is to classify children into one of 3 categories with regard to literacy: Not at Risk, Uncertain, At Risk. There are 3 subtests: word recognition, reading comprehension, and writing. A student must perform well on all 3 subtests to be considered Not at Risk. Students performing poorly on all 3 subtests are considered At Risk. All other students are classified into the Uncertain category.

Recommendation: Each exam should be re-evaluated in terms of its intended purpose. Many exams have persisted in the system despite the fact that users have lost sight of their intended utility. In some instances, the exam no longer serves the intended purpose. In these and other cases, small changes could substantially increase the utility of the exam results.

Additional Annex 17: Operational Structure for Rose II
JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II



Additional Annex 18: Abbreviated Resettlement Plan for the Rivesdale Site
JAMAICA: REFORM OF SECONDARY EDUCATION PROJECT II

The site for the construction of a High School in Riversdale, St. Catherine have illegal occupants. As a result, a survey was conducted in the beginning of March from which the following information was obtained.

Table 1: Status of Settlements

Household Number	No. of persons in Household	No. of Children	Employment Status	Evaluation of Assets	Comments
1	1	none	unemployed	$8,000	Willing to be relocated
2	7	5	Domestic Helper	$20,000	Willing to be relocated
3	5	3	Higgler	$15,000	Willing to be relocated
4	4	3	unemployed	$10,000	Willing to be relocated
5	6	4	Carpenter	$15,000	Willing to be relocated
6	4	2	Labourer	$20,000	Willing to be relocated

The findings of the survey indicate that the dwellings occupied by the settlers are in a state of disrepair arising mainly from the fact that they were not properly constructed in the first place. The dwellings are board structures with no proper utilities in place.

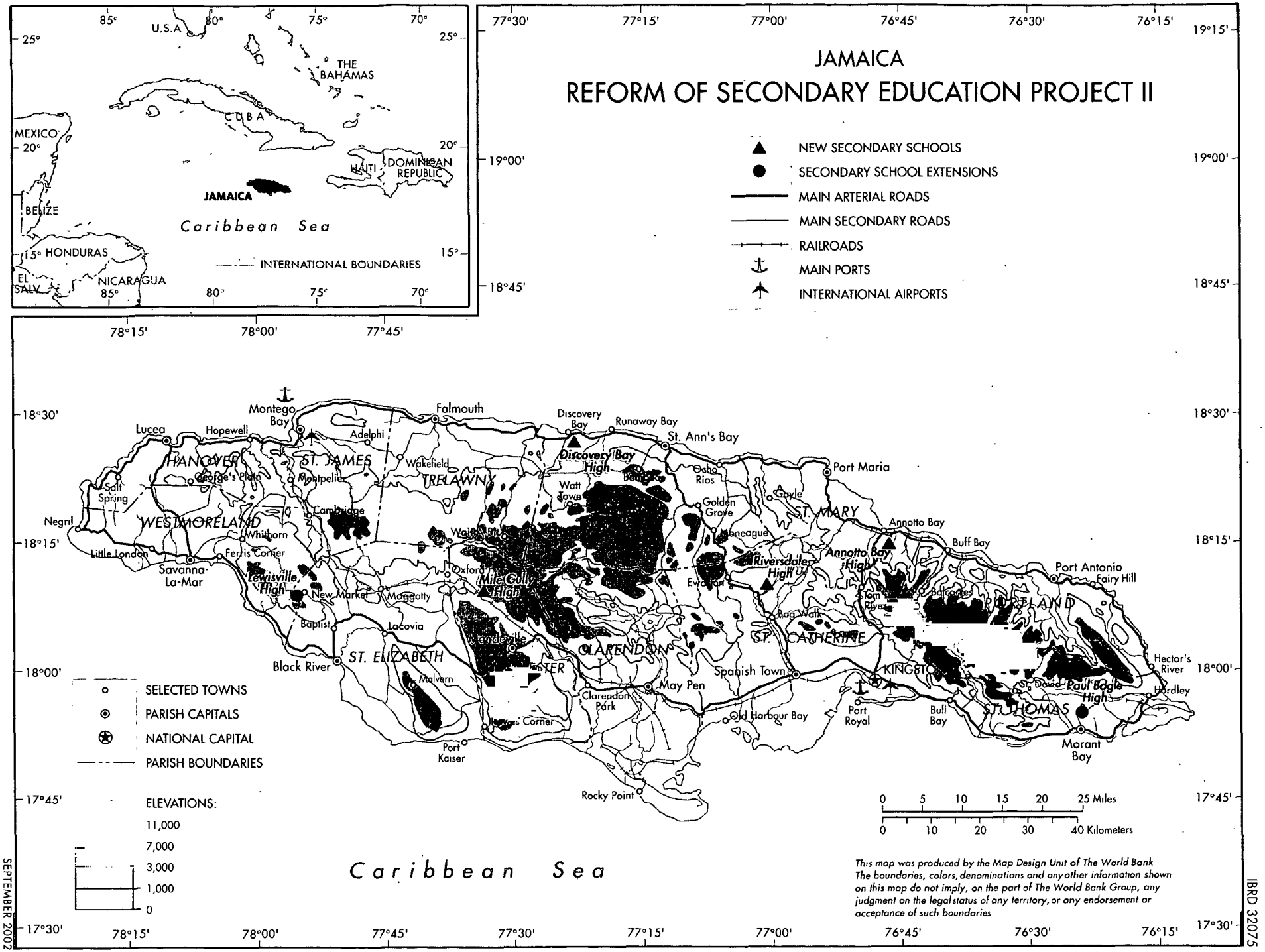
Table 2: Resettlement Schedule

Activities	Dates	Budget	Comments
Conduct census survey of persons on site	February, 2002	1 household @ $15,000 2 households @ $20,000 3 households @ 25,000 **Total of $130,000**	$15,000 - $25,000 in kind, per household depending on size of households. This will be in the form of building materials.
Identify alternate site(s)	February, 2002		Site identified, but settlers prefer to find their own sites
Serve official notice	May, 2002		Will be done by the National Land Agency
Persons relocated	By July 31, 2002		
Visit from the Estate Management Division of the National Land Agency	September 9, 2002		Visit will be to confirm relocation of settlers.

Discussions were held with the settlers and they indicated a willingness to be relocated. With this in mind, a location was identified for the households to be relocated. The settlers, however prefer to choose their own site. Consequent upon that, they have identified locations in different areas in Riversdale and some have started their construction and are making preparation to relocate.

In order to aid in the relocation process, the households will be provided with assistance in terms of building materials. The families have indicated their agreement with the terms offered and have also indicated a willingness to work with the relocation timetable discussed.

The Estate Management Division of the National Land Agency will be responsible for the monitoring and implementation of these activities.No later than 12 months after the relocation date, the MOEYC will make reasonable efforts to locate and follow up on the relocated families to determine if they have been able to reestablish their livelihood and living situation. If this is not the case for any or all of the persons relocated, further assistance will be provided by the relevant Government institution.


JAMAICA
REFORM OF SECONDARY EDUCATION PROJECT II
NEW SECONDARY SCHOOLS
SECONDARY SCHOOL EXTENSIONS
MAIN ARTERIAL ROADS
MAIN SECONDARY ROADS
RAILROADS
MAIN PORTS
INTERNATIONAL AIRPORTS
INTERNATIONAL BOUNDARIES
SELECTED TOWNS
PARISH CAPITALS
NATIONAL CAPITAL
PARISH BOUNDARIES
ELEVATIONS:
11,000
7,000
3,000
1,000
0
Caribbean Sea
U.S.A.
THE BAHAMAS
CUBA
MEXICO
HAITI
DOMINICAN REPUBLIC
JAMAICA
BELIZE
HONDURAS
EL SALV.
NICARAGUA
Montego Bay
Falmouth
Discovery Bay
Runaway Bay
St. Ann's Bay
Port Maria
Ocho Rios
Lucea
Hopewell
Adelphi
Wakefield
Montpelier
Watt Town
Golden Grove
Moneague
Annotto Bay
Buff Bay
Port Antonio
Fairy Hill
Salt Spring
Negril
Whithorn
Cambridge
Little London
Ferris Corner
Savanna-La-Mar
Oxford
Mile Gully
Ewarton
Riversdale
Annotto Bay
Lewisville
New Market
Maggotty
Baptist
Lacovia
Black River
Malvern
Mandeville
Clarendon Park
May Pen
Spanish Town
Old Harbour Bay
Port Royal
Bull Bay
Morant Bay
Hector's River
Hardley
Port Kaiser
Rocky Point
HANOVER
ST. JAMES
TRELAWNY
WESTMORELAND
ST. MARY
PORTLAND
ST. CATHERINE
CLARENDON
ST. ELIZABETH
KINGSTON
ST. THOMAS
0 5 10 15 20 25 Miles
0 10 20 30 40 Kilometers
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