Document of the Inter-American Development Bank

**Jamaica**

**Support for education Sector Reform III**

**(JA-L1033)**

**monitoring and evaluation plan**

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| **Abbreviations** | |
| BA | Bachelor’s Degree |
| CAA | Curriculum and Assessment Agency |
| CAP | Career Advancement Program |
| CSEC | Caribbean Secondary Examination Certificate |
| DSS | Department for School Services |
| EFF | Extended Fund Facility |
| EMIS | Education Management Information System |
| ESTP | Education Sector Transformation Program |
| ETT | Education Transformation Team |
| FY | Fiscal Year |
| GCI-9 | Ninth General Increase in the Resources of the Inter-American Development Bank |
| GDP | Gross Domestic Product |
| GOJ | Government of Jamaica |
| GSAT | Grade Six Achievement Test |
| HR | Human Resources |
| ICT | Information and Communication Technology |
| IDB | Inter-American Development Bank |
| IMF | International Monetary Fund |
| JTC | Jamaica Teaching Council |
| J-TEC | Jamaica Tertiary Education Commission |
| JSAS | Jamaica School Administrative Software |
| MOE | Ministry of Education |
| MOFP | Ministry of Finance and Planning |
| NAP | National Assessment Program |
| NPTA | National Parent Teacher Association |
| NCEL | National College for Educational Leadership |
| NEI | National Education Inspectorate |
| NET | National Education Trust |
| NPTA | National Parent Teacher Association |
| NSC | National Standards Curriculum |
| OPC | Office of the Parliamentary Counsel |
| PBP | Programmatic Policy Based Loan |
| PCR | Project Completion Report |
| PEP | Primary Exit Profile |
| PESP | Primary Education Support Project |
| PIOJ | Planning Institute of Jamaica |
| PMAS | Performance Management Appraisal System |
| POD | Proposal for Operation Development |
| QECs | Quality Education Circles |
| REA | Regional Education Agencies |
| SAU | Student Assessment Unit |
| SPF | Safeguard Policy Filter |
| SSF | Safeguard Screening Form |
| SWPBIS | School Wide Program for Behavior Intervention and Support |
| TF | Taskforce on Educational Reform |
| TSC | Teachers Service Commission |
| UWI | University of the West Indies |
| WB | World Bank |
|  | |

**Support for education Sector Reform III**

**(JA-L1033)**

**monitoring and evaluation plan**

1. INTRODUCTION
   1. The objective of this program is to improve the learning outcomes of Jamaica’s students by: supporting the modernization of the Ministry of Education, increasing the effectiveness of the delivery of the education services, improving the standards and quality of education, raising the level of professionalism of the teaching profession, enhancing the accountability of the system and improving stakeholder and community involvement in education.
   2. The program is structured as a Policy Based Loan under the Programmatic approach (PBP) with three operations. This is the third of the PBP series that will disburse US$25 million in a single tranche.
   3. In addition to the requirements for a macroeconomic framework aligned with the program’s goal and in line with the agreement with the IMF, the third operation will continue to focus on the three reform areas identified in the first programmatic loan:
   4. **Reform Area I. Modernization of the Ministry of Education (MOE).** The objectives of this component are to transform the MOE into a policy ministry focused on policy formulation, quality assurance, monitoring and evaluation, standard setting and agency coordination, and to strengthen its operational capacity to support schools and monitor their accountability for improved results.
   5. **Reform Area II. Curriculum, teaching, learning and school management**. This reform area intends to improve the quality of education through the implementation of the National Literacy Strategy and the National Mathematics Strategy; enhance accountability of the system through the appraisal of principal, guidance counselors, and teachers; and improve the quality of teaching by supporting continuing education for teachers.
   6. **Reform Area III. Relationship with communities and stakeholders and behavior modification.** Improved relationships with communities and other stakeholders in the education, particularly parents, is an important pillar of the education transformation process. These efforts aim at informing and engaging the community and stakeholders and also improving behavior of youth. In this effort, MOE/ESTP continues to engage its major stakeholders in the expectation to eventually affect behavior changes in students and also parents.
2. MONITORING
   1. **Indicators**
   2. The Results Matrix contains the results and output indicator. The matrix reflects the three operations of the PBP; the indicators related to the first two operations have already been achieved.
   3. Only the indicators related to the third operation will be monitored towards the achievement of its targets. The indicators related to the previous two operations of the programmatic series of loans have been achieved. The seven selected results indicators reflect the main objective of the Education System Transformation Program of the Government of Jamaica which the IDB has supported through the three PBL operations. The output indicators reflect the policy changes that lead to each of the proposed results under each of three areas of reform. All outcomes and outputs will be collected in November 2015.

**Table I. Outcome indicators**

| **Result Indicator** | **Unit of measure** | **Baseline** | **Target** | **Means of verification and agency responsible** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| **Result 1. Improved students’ learning** | | | | | |
| % of students with proficiency in grade 4 math | Percentage | 38% (2004) | 58% (2014) | Report on Test results, MOE |  |
| % of students with proficiency in grade 4 language | Percentage | 57% (2004) | 78%(2014) | Report on Test results, MOE |  |
| Average percentage score at GSAT for math and language | Percentage | Math: 44% (2004)  Language: 48% (2004) | Math: 63%(2014)  Language: 63%(2014) | Report on Test results, MOE |  |
| % of cohort attaining Grades 1-3 in 5 CSEC subjects including Math and English | Percentage | 12.5% (2006) | 18%(2014) | Report on Test results, MOE |  |
| **Result 2. Modernized central Ministry of Education focusing on policy formulation, monitoring and evaluation, standard setting and agencies coordination** | | | | | |
| MOE operating with new roles: policy formulation, monitoring and evaluation, standard setting and agencies coordination | Number | 0 | 1 (2015) | Functional profile document and operational manuals, MOE |  |
| **Result 3. Effective delivery of education through decentralization of functions to the regions** | | | | | |
| DSS operational | Number | 0 | 1(2016) | Letter from PS noting Cabinet decision, MOE | Operational refers to: the agency was created, key staff has been hired and its working towards its mandate |
| **Result 4. Improved standards and quality of the education system at all levels** |  |  |  |  |  |
| National Education Inspectorate (NEI) operational | Number | 0 | 1(2015) | Letter from PS, MOE | Operational refers to: the agency was created, key staff has been hired and its working towards its mandate |
| **Result 5. Raised level of professionalism and quality of teaching** |  |  |  |  |  |
| Jamaica Teaching Council (JTC) operational | Number |  | 1(2015) | Letter from PS, MOE | Operational refers to: the agency was created, key staff has been hired and its working towards its mandate |
| % of teacher with BA | Percentage | 30% (2006) | 62%(2015) | Letter from the PS, MOE |  |
| % of teachers registered in an Unified System of Registration | Percentage | 0% | 95%(2015) | Letter from PS, , MOE |  |
| **Result 6. Enhanced accountability of the system** |  |  |  |  |  |
| National College of Educational Leadership (NCEL) operational | Number | 0 | 1(2015) | Letter from PS noting Cabinet decision, , MOE | Operational refers to: the agency was created, key staff has been hired and its working towards its mandate |
| NEI’s appraisal reports used by NCEL to target principals training in under performing schools | Number | 0 | 1(2015) | Letter from the PS, , MOE |  |
| NEI’s appraisal reports used by JTC to focus in-service training | Number | 0 | 1(2015) | Letter from the PS, , MOE |  |
| **Result 7: Improved stakeholder and community involvement in education** |  |  |  |  |  |
| National Parenting Policy legislation approved | Number |  | 1(2015) | PS letter with Cabinet approval, , MOE |  |
| National Parenting Support Commission operational | Number | 0 | 1(2015) | PS letter with Cabinet approval, , MOE | Operational refers to: the agency was created, key staff has been hired and its working towards its mandate |

**Table II. Output indicators**

| **Output Indicator** | **Unit of measure** | **Baseline** | **Target**  **(2015)** | **Means of verification and agency responsible** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| **Products for Result 2. Modernized central Ministry of Education focusing on policy formulation, monitoring and evaluation, standard setting and agencies coordination** | | | | | |
| Students benefitted by education project | Number | 0 | 630,000  316,000 (Male)  314,000 (Female)  132,000 (preprimary)  257,000 (primary)  240,000 (secondary) | Education Statistics Report. Note that all students enrolled in the education system benefit from the reforms of this operation, MOE |  |
| Functions of the DSS and central MOE defined | Number | 0 | 1 | Functional profile document and operational manuals, MOE |  |
| Key HR positions filled | Number | 0 | 3 | Letter from the PS indicating key positions, MOE |  |
| Business Plan for 2013-2015 and operational plan for 2014-2015 completed | Number | 0 | 2 | Document of business and operational plan, MOE |  |
| Job descriptions for NET completed | Number | 0 | 1 | NET’s framework document, functional profile and business plan, MOE |  |
| PPP manager for school construction recruited at NET | Number | 0 | 1 | NET’s framework document, functional profile and business plan, MOE |  |
| EMIS designed and connecting MOE with regional offices | Number | 0 | 1 | EMIS framework document, MOE |  |
| Number of schools de-shifted | Number | 0 | 25 | Summary document with rationalization plan including number of schools de-shifted, MOE |  |
| Consultations on establishment of JTC legislation completed | Number | 0 | 1 | Consultation report on JTC , MOE |  |
| Legislation on establishment of JTC drafted by CPC for submission to Parliament | Number | 0 | 1 | Consultation report on JTC, MOE |  |
| Drafting instructions for amendment of Education Act sent to CPC | Number | 0 | 1 | Drafting instruction for amendment of the Education Act, MOE |  |
| **Products for Result 3. Effective delivery of education through decentralization of functions to the regions** | | | | | |
| Number of schools administered and supervised by REAs | Number | 0 | 204 | PS report, MOE |  |
| Percentage of schools completing school improvement plan | Percentage | 0% | 80% | School improvement plan summary report, MOE |  |
| Number of school working with DSS for including NEI recommendations in school improvement plan. | Number | 0 | 132 | DSS operation turnaround report, MOE |  |
| Number of quality education circles established to support all schools in improving performance | Number | 0 | 63 | Letter from PS with report on activities and copy of map showing location of QECs, MOE |  |
| **Products for Result 4. Improved standards and quality of the education system at all levels** | | | | | |
| NEI core staff hired | Number | 0 | 6 | PS letter and description of the 6 positions hired, MOE |  |
| Guidelines for school self-evaluation created | Number |  | 1 | Guidelines for Self Evaluation and PS Letter , MOE |  |
| Number of schools with inspection completed | Number | 0 | 954 | NEI Report., MOE |  |
| NEI Inspection handbook printed | Number | 0 | 1 | Inspection Handbook, MOE |  |
| NEI inspectors for the evaluation of the education system trained | Number | 0 | 300 | Letter from the PS stating the number of inspector trained, MOE |  |
| Proficiency Pathways for primary education students operational | Number | 0 | 1 | Handbook and charts of Proficiency Pathway program, MOE |  |
| Method to identify children with special needs developed | Number | 0 | 1 | Child find report, MOE |  |
| Alternative Program for Exceptional Students (APEX) developed | Number | 0 | 1 | Program’s Concept Document, MOE |  |
| **Products for Result 5. Raised level of professionalism and quality of teaching** | | | | | |
| Standards for teaching profession developed | Number | 0 | 1 | Booklet of standards, MOE |  |
| Teacher licensing regime developed | Number | 0 | 1 | Manual for teacher licensing regime, MOE |  |
| Number of mentors trained for the Teacher Mentorship Program | Number | 0 | 900 | Mentoring program handbook, MOE |  |
| In-service teacher training program under way | Number | 0 | 1 | Report of in service teacher training program, MOE |  |
| **Products for Result 6. Enhanced accountability of the system** | | | | | |
| Performance appraisal instruments in use for Principals and Guidance Counselors | Number | 0 | 1 | NCEL report and performance appraisal documents, MOE |  |
| **Products for Result 7: Improved stakeholder and community involvement in education** | | | | | |
| Parents mentors trained by NPSC to reach out to parents in the community | Number | 0 | 70 | Report on parents mentor program, MOE |  |
| Marketing campaign ongoing including the distribution of Newsletters to all staff and schools and regular TV and radio broadcasts | Number | 0 | 1 | Letter from the PS, MOE |  |
| School Wide Program for Behavior Intervention and Support in Schools (SWPBIS) implemented | Number | 0 | 1 | Letter from the PS, MOE |  |

* 1. **Monitoring Coordination, Work Plan and Budget.**
  2. MOE will be the Executing Agency and MOFP will act as Program Coordinator, assisted by the PIOJ. MOE is responsible for overall preparation and implementation of the program, including facilitating MOFP’s compilation of the means of verification. MOFP, as the Program Coordinator, will be responsible for: (i) monitoring and coordinating activities to comply with program commitments; and (ii) coordinating the submission to the IDB of the required reports to verify compliance with the policy matrix. The IDB will be responsible for revising the compliance with the policy conditions as well as preparing of the report of compliance with conditions.
  3. The disbursement of the current operation will be done in a single tranche subject to compliance to the conditions summarized in the Policy Matrix and verified through the Means of Verification agreed with the GOJ. The indicators of the Results Matrix will be collected using the same means of verification as the Policy Matrix.
  4. The main monitoring activities of the operation focus on the preparation and presentation of the means of verification for each policy condition and the preparation of the report of compliance with policy conditions. The monitoring work plan is described in the following table:

**Table III. Main activities, timeline, responsibilities and costs of Monitoring**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Activity** | **November 2015** | | | | **Responsible** | **Costs** | **Funding** |
| week 1 | week 2 | week 3 | week 4 |
| Collection of means of verifications |  |  |  |  | MOFP | - | - |
| Submission of means of verifications |  |  |  |  | MOFP | - | - |
| Final review of the accomplishment of the policy conditions |  |  |  |  | IDB | US$2000 | IDB |
| Preparation of the report of compliance with conditions |  |  |  |  | IDB | US$2000 | IDB |
| **Total** | | | | | | **US$4000** |  |

1. EVALUATION
   1. The main objective of the evaluation plan is to determine whether the interventions and policy reforms supported by the program contributed to the expected results. Result indicators for each program component are included in the results matrix. Given that this is the third and final operation of a PBP and that the three operations supported the education reform, the evaluation proposed will be comprehensive of the three operations.
   2. Furthermore, the evaluation will provide key inputs for the Project Completion Report (PCR) that will be produced to assess the program.
   3. **Main Evaluation Question(s).**
   4. The evaluation aims to answer the following questions:
2. Did the policy reforms supported by the PBP contribute to increasing students’ learning in Jamaica?
3. Did the policy reforms supported by the PBP improve the effectiveness of delivering education through the decentralization of key functions to the regional offices via the DSS?
4. Did the policy reforms supported by the PBP improve the standards and quality of the education system?
5. Did the policy reforms supported by the PBP raise the level of professionalism and quality of teaching?
6. Did the policy reforms supported by the PBP enhance the accountability of the system?
7. Did the policy reforms supported by the PBP improve stakeholder and community involvement in education?
8. How did the policy reforms supported by the PBP contributed to the expected results?
9. Were there any other unanticipated results achieved through the policy reforms supported by the PBP?
10. How relevant are the policy reforms to Jamaica’s main education challenges?
11. Are the policy reforms sustainable over time?
    1. **Existing Knowledge**
    2. The interventions and the expected results of the Education Reform process in Jamaica have been monitored both internally by the MOE and by the IDB and other lending partners. Reports show that the reform process is on track and that the main results for student learning have been improving over time.
    3. **Key outcome indicators.**
    4. The key outcomes as described in the results matrix include:
12. Improved student learning;
13. Modernized central Ministry of Education focusing on policy formulation, monitoring and evaluation, standard setting and agency coordination;
14. Effective delivery of education through decentralization of functions to the regions;
15. Improved standards and quality of the education system at all levels;
16. Raised level of professionalism and quality of teaching;
17. Enhanced accountability of the system; and
18. Improved stakeholder and community involvement in education.
    1. The indicators to measure the 7 key outcomes are presented in the table below. Note that all the information needed to measure the results will be collected in January and February 2016. The MOE will be responsible for providing all the information.

**Table IV. Outcome indicators**

| **Result Indicator** | **Unit of measure** | **Baseline** | **Target** | **Means of verification and source of data** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| **Result 1. Improved students’ learning** | | | | | |
| % of students with proficiency in grade 4 math | Percentage | 38% (2004) | 58% (2014) | Report on Test results, MOE |  |
| % of students with proficiency in grade 4 language | Percentage | 57% (2004) | 78%(2014) | Report on Test results, MOE |  |
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| % of cohort attaining Grades 1-3 in 5 CSEC subjects including Math and English | Percentage | 12.5% (2006) | 18%(2014) | Report on Test results, MOE |  |
| **Result 2. Modernized central Ministry of Education focusing on policy formulation, monitoring and evaluation, standard setting and agencies coordination** | | | | | |
| MOE operating with new roles: policy formulation, monitoring and evaluation, standard setting and agencies coordination | Number | 0 | 1 (2015) | Functional profile document and operational manuals, MOE |  |
| **Result 3. Effective delivery of education through decentralization of functions to the regions** | | | | | |
| DSS operational | Number | 0 | 1(2016) | Letter from PS noting Cabinet decision, MOE | Operational refers to: the agency was created, key staff has been hired and its working towards its mandate |
| **Result 4. Improved standards and quality of the education system at all levels** |  |  |  |  |  |
| National Education Inspectorate (NEI) operational | Number | 0 | 1(2015) | Letter from PS, MOE | Operational refers to: the agency was created, key staff has been hired and its working towards its mandate |
| **Result 5. Raised level of professionalism and quality of teaching** |  |  |  |  |  |
| Jamaica Teaching Council (JTC) operational | Number |  | 1(2015) | Letter from PS, MOE | Operational refers to: the agency was created, key staff has been hired and its working towards its mandate |
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| % of teachers registered in an Unified System of Registration | Percentage | 0% | 95%(2015) | Letter from PS, , MOE |  |
| **Result 6. Enhanced accountability of the system** |  |  |  |  |  |
| National College of Educational Leadership (NCEL) operational | Number | 0 | 1(2015) | Letter from PS noting Cabinet decision, , MOE | Operational refers to: the agency was created, key staff has been hired and its working towards its mandate |
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| NEI’s appraisal reports used by JTC to focus in-service training | Number | 0 | 1(2015) | Letter from the PS, , MOE |  |
| **Result 7: Improved stakeholder and community involvement in education** |  |  |  |  |  |
| National Parenting Policy legislation approved | Number |  | 1(2015) | PS letter with Cabinet approval, , MOE |  |
| National Parenting Support Commission operational | Number | 0 | 1(2015) | PS letter with Cabinet approval, , MOE | Operational refers to: the agency was created, key staff has been hired and its working towards its mandate |

* 1. **Evaluation Methodology.**
  2. The methodology to evaluate the results of the program will be twofold: (1) an ex post cost benefit analysis will be conducted for the main measurable benefits and costs; and (2) a “before-after” that will compare the value of the main results before the launch of the first PBL and the value after completing the third PBL. The data to evaluate the results is ready available at the MOE. To complement this analysis, a set of interviews will be carried out with key stakeholders to assess unanticipated results, the relevance of the policy implemented and the sustainability of the program and lessons learnt.
  3. **Reporting evaluation results.**
  4. The results of the evaluation will be compiled and reported in the PCR of the program. This report will be completed six months after the sole disbursement of the operation is completed.
  5. **Evaluation coordination, work plan and budget**
  6. The total cost of the evaluation plan is US$80,000, and will be financed with administrative funds assigned for the PCR. The evaluation will be carried out subject to the availability of these funds. The IDB will hire an independent consultant to carry out the ex post cost benefit analysis and prepare the Project Completion Report (PCR), which will be validated by the MFPS. The borrower is responsible for cooperating with the IDB team and the consultant(s) hired by the IDB in all the matters related with the Evaluation of this program.

**Table V. Main activities, timeline, responsibilities and costs of Evaluation**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Activity** |  |  | | | **2016** | | | **Responsible** | **Costs** | **Funding** |
| Jan | Feb | Mar | Jun | | Jul | Aug |
| Collection of information on main results |  |  |  |  | |  |  | IDB | US$10,000 | IDB |
| Interview to key stakeholders |  |  |  |  | |  |  | IDB | US$10,000 | IDB |
| Cost Benefit Analysis |  |  |  |  | |  |  | IDB | US$30,000 | IDB |
| Preparation of the PCR report |  |  |  |  | |  |  | IDB | US$30,000 | IDB |
| Completion of PCR report |  |  |  |  | |  |  | IDB | - | IDB |
| **Total** | | | | | | | | | US$80,000 |  |