

Ministry of Education,
Science and Technology
Republic of Malawi

Japan International
Cooperation Agency

THE NATIONAL SCHOOL MAPPING AND MICRO-PLANNING PROJECT IN THE REPUBLIC OF MALAWI - MICRO-PLANNING COMPONENT-

FINAL REPORT SUMMARY



AUGUST 2002

KRI INTERNATIONAL CORP.

PREFACE

In response to a request from the Government of the Republic of Malawi, the Government of Japan decided to conduct the National School Mapping and Micro-Planning Project and entrusted it to the Japan International Cooperation Agency.

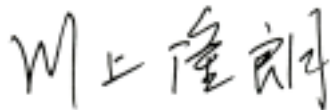
JICA selected and dispatched a project team headed by Ms. Yoko Ishida of the KRI International Corp., to Malawi, four times between November 2000 and July 2002. In addition, JICA set up an advisory committee headed by Mr. Nobuhide Sawamura, Associate Professor of Hiroshima University, between October 2000 and June 2002, which examined the project from specialist and technical point of view.

The team held discussions with the officials concerned of the Government of Malawi and implemented the project activities in the target areas. Upon returning to Japan, the team conducted further analyses and prepared this final report.

I hope that this report will contribute to the promotion of the quality education provision in Malawi and to the enhancement of friendly relations between our two countries.

Finally, I wish to express my sincere appreciation to the officials concerned of the Government of Malawi for their close cooperation extended to the project.

August 2002



Takeo Kawakami

President

Japan International Cooperation Agency (JICA)

August 2002

Mr. Takao Kawakami
President
Japan International Cooperation Agency (JICA)
Tokyo, Japan

Dear Mr. Kawakami

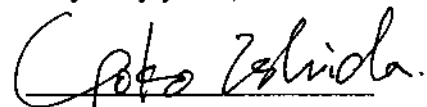
Letter of Transmittal

We are pleased to submit to you the Final Report on “The National School Mapping and Micro-Planning Project in the Republic of Malawi.” Under the contract with your esteemed organization, the subject project was carried out for the 22-month period from October 2000 to August 2002.

The project team provided training on micro-planning, thereby formulating the district education plans for primary and secondary education sub-sectors to enhance capacity building in planning and to foster the decentralization policy of the Government of Malawi. In conducting the project, the project team developed training curriculum, program, and materials for micro-planning training workshops where all the 33 education district plans were formulated by the district education officials. In addition, it implemented demonstration projects for its pilot districts based on their respective education plans.

We wish to take this opportunity to express our sincere gratitude to JICA, Ministry of Foreign Affairs, Ministry of Education, Culture, Sports, Science and Technology, and Hiroshima University. We also wish to express our deepest gratitude to Ministry of Education, Science and Technology, other concerned offices, and education personnel as well as community leaders of the Republic of Malawi for the courtesies and cooperation extended to the team during the course of the project.

Very truly yours,



Yoko Ishida

Team Leader

**- LOCATION MAP -
Republic of Malawi**

**List of
Education Districts**

North (8 Districts)

1. Chitipa
2. Karonga
3. Rumphi
4. Nkhata Bay
5. Mzimba North
6. Mzimba South
7. Mzuzu City
8. Likoma

Central East (5 Districts)

9. Kasungu
10. Nkhotakota
11. Ntchisi
12. Dowa
13. Salima

Central West (6 Districts)

14. Lilongwe Urban
15. Lilongwe Rural East
16. Lilongwe Rural West
17. Mchinji
18. Dedza
19. Ntcheu

South East (5 Districts)

20. Mangochi
21. Machinga
22. Balaka
23. Zomba Urban
24. Zomba Rural

South West (5 Districts)

25. Blantyre City
26. Blantyre Rural
27. Mwanza
28. Chikwawa
29. Nsanje

Shire Highlands (4 Districts)

30. Chiradzulu
31. Thyolo
32. Mulanje
33. Phalombe

 Pilot Districts

ZAMBIA

TANZANIA

MOZAMBIQUE

MOZAMBIQUE





Photo-1 Primary school with PCOSP



Photo-2 Teacher house under PCOSP



Photo-3 Primary school in Thyolo



Photo-4 Primary school in Thyolo



Photo-5 Teacher training at TDC



Photo-6 School committee meeting



Photo-7 Public well in primary school



Photo-8 Classroom under the tree



Photo-9 Kick-off workshop



Photo-10 Trainers' training



Photo-11 Micro-planning training



Photo-12 Micro-planning group work



Photo-13 Trainers' certificate



Photo-14 Stakeholders' meeting



Photo-15 Training in demonstration project



Photo-16 Computer training

REPUBLIC OF MALAWI
MICRO-PLANNING COMPONENT
THE NATIONAL SCHOOL MAPPING AND MICRO-PLANNING PROJECT
FINAL REPORT
SUMMARY

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ABBREVIATIONS

ABB	Active-Based Budgeting
ADEM	Assistant District Education Manager (formerly called ADEO)
ADEO	Assistant District Education Officer
CDSS	Community Day Secondary School
CERT	Center for Education Research and Training
CI	Chiradzulu Initiative
CIDA	Canadian International Development Agency
CPEA	Coordinating Primary Education Advisor
CSP	Community Sub-Project
DA	District Assembly
DANIDA	Danish International Development Agency
DDLA	Department of District and Local Administration
DDP	District Development Plan
DEM	District Education Manager (formerly called DEO)
DEO	District Education Officer
DEP	District Education Plan
DF	Director of Finance
DfID	Department for International Development
DLG	Department of Local Government
DPD	Director of Planning and Development
EMIS	Education Management Information System
FPE	Free Primary Education
GER	Gross Enrollment Ratio
GoJ	Government of Japan
GoM	Government of Malawi
HIV/AIDS	Human Immuno-deficiency Virus and Acquired Immune Deficiency Syndrome
IEC	Information, Education and Communication
INSET	In-Service Training for Teachers
JICA	Japan International Cooperation Agency
M&E	Monitoring and Evaluation
MANEB	Malawi National Examination Board
MASAF	Malawi Social Action Fund
MCDE	Malawi College of Distance Education
MK	Malawi Kwacha
M/M	Minutes of Meeting
MoEST	Ministry of Education, Science and Technology
MoF	Ministry of Finance
MSSSP	Malawi Schools System Support Program
MTEF	Medium Term Expenditure Framework

NER	Net Enrollment Ratio
NGO	Non-Governmental Organization
NSO	National Statistical Office
PCOSP	Primary Community Schools Project
PEA	Primary Education Advisor
PIF	Policy and Investment Framework
PRSP	Poverty Reduction Strategy Paper
PTA	Parent Teacher Association
PWP	Public Works Program
SIP	Sector Investment Program
S/W	Scope of Works
TDC	Teacher Development Center
UNDP	United Nations Development Program
UNICEF	United Nations Children's Fund
UNIMA	University of Malawi
UPE	Universal Primary Education
USAID	United States Agency for International Development

EXCHANGE RATE

(as of August 2, 2002)

US\$1.00 = MK75.28 = Yen119.31

CHAPTER 1 INTRODUCTION

Since October 2000, the Micro-Planning Component of the National School Mapping and Micro-Planning Project in the Republic of Malawi (the Project) was conducted by the Ministry of Education, Science and Technology (MoEST) and a consultant team of Japan International Cooperation Agency (JICA) (the Project Team). The Project aimed at institutional strengthening of the central and local administration system in the primary and the secondary education sub-sectors. It is supportive of decentralization efforts, which has been promoted by the Government of Malawi (GoM), and *the Education: Policy and Investment Framework (PIF)* in the education sector, which was prepared and approved by GoM in September 2000.

Through the approximately 2-year collaboration between MoEST and the Project Team, the Project furthered awareness of data management and capacity building in planning at the district level of education officials and created the District Education Plans of all the education districts in the Republic of Malawi, which are highly expected to contribute to promotion of the decentralization policy of the government. The background, objectives and activities of the Project are summarized below:

1.1 Project Outline

1.1.1 Background

The implementation of the free primary education (FPE) policy in 1994 resulted in a dramatic increase of the number of children enrolled in Malawi's primary education sector. Enrollment rose from just about 2 million to about 3 million and have more or less stabilized at this level. The rapid increase in the participation rate has caused serious problems in public access to quality primary and secondary education despite various efforts by GoM in collaboration with international development partners. These problems include severe shortages of classrooms, textbooks, education materials, and trained teachers. The dropout and repetition rate have also risen.

To address these constraints, GoM has embarked on a comprehensive approach to the development of the education sector under *PIF* which was developed and revised in the year 2000. *PIF* stresses the important role of the national school mapping and micro-planning project in helping to address some of the key challenges facing the Malawi education sector. This national project is an innovative challenge promoted by MoEST with the technical and financial assistance of a international development partner group. At the same time, GoM has promoted decentralization through institutional strengthening of the local governments. The national project is expected to make significant contribution

not only to the improvement of planning and implementation capability in the local primary and secondary education sector, but also in the promotion of decentralization attempts at the local level.

GoM requested technical assistance from the Government of Japan (GoJ) for the implementation of the Micro-Planning activities of the Project. Based on the Minutes of Meeting (M/M) and the Scope of Work (S/W) signed by the MoEST and JICA in April 2000 and in June 2000, respectively, the National School Mapping and Micro-Planning Project (the Project) was conducted for 22 months from October 2000 to July 2002. The Project focuses on capacity building of the central and local administration offices and staff members in the primary and secondary education sector through collaborative works by the Government of Malawi, the JICA Project Team, JICA, other international development partners and the NGOs concerned.

1.1.2 Objectives, Approaches and Components

(1) Objectives

The Project aimed at institutional strengthening of the central and local administration system in the primary and secondary education sub-sector in the Republic of Malawi. The specific focus of the Project was capacity building in the areas of planning and implementing education development plans at the local level.

(2) Approaches

To accomplish the objective, the Project adopted the following four major approaches:

- (1) Formulate a collaborative and sustainable organization structure for the development of the primary and secondary education sector with GoM and in collaboration with international development partners, and local/international NGOs;
- (2) Conduct the Project while improving understanding of the importance of local-level planning based on effective data management;
- (3) Within the socio-economic and education context, respect local needs and potentials and promote community participation in planning and implementing training and micro-planning activities; and
- (4) Produce practical outputs, which show future steps to develop the primary and secondary education sector by making full use of the accomplishments of the GoM, international development partners and NGOs.

(3) Components

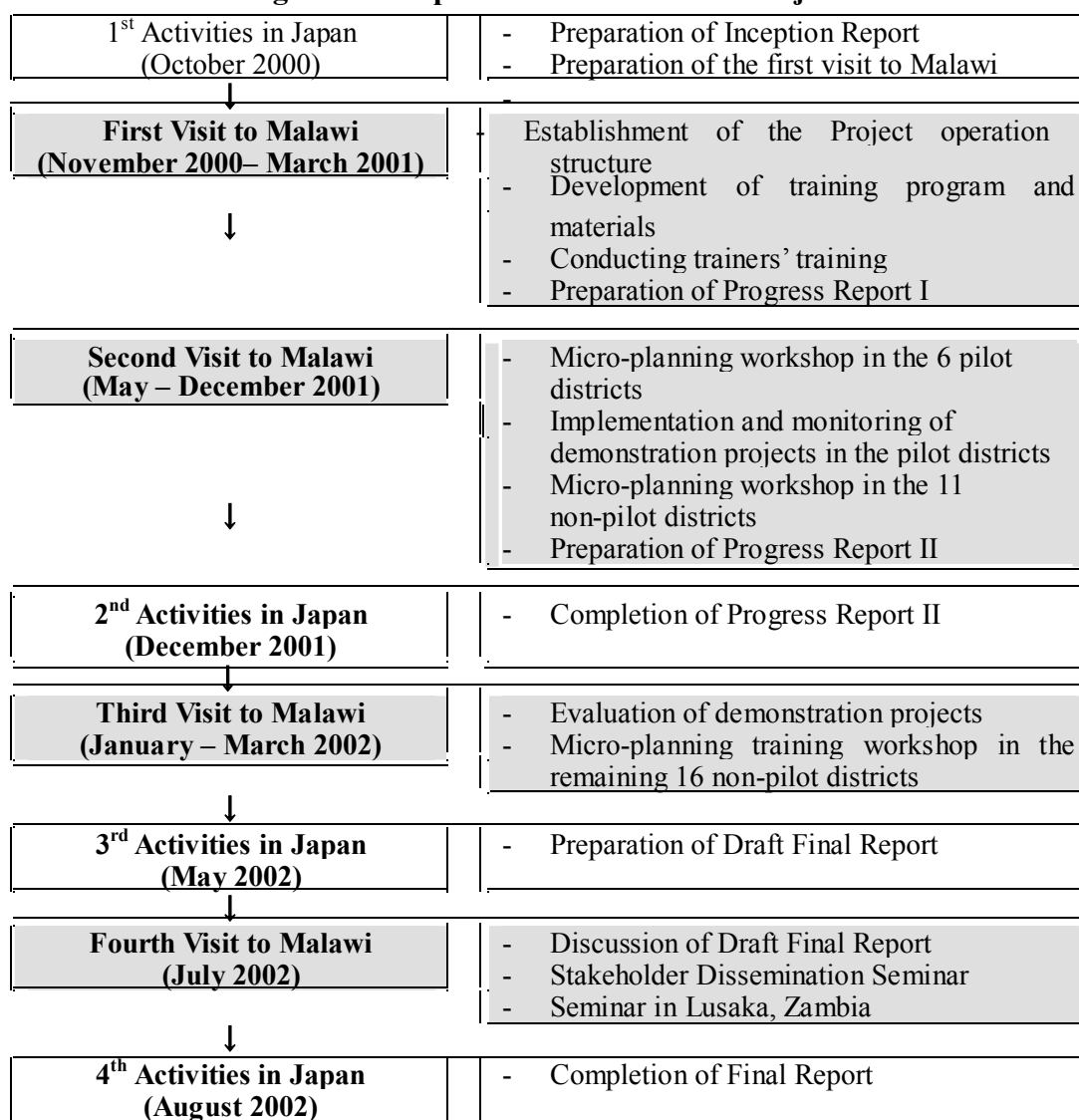
The Project consisted of the following four components:

- 1) Planning and establishing a training system in micro-planning;
- 2) Conducting training and micro-planning (preparation of district-level education development plans) in the 6 (six) pilot districts of the Decentralization Project;
- 3) Implementing demonstration projects in the pilot districts; and
- 4) Training and micro-planning (preparation of skeleton of district-level education development plans) in all other districts in Malawi.

(4) Steps and Schedule

The Project was conducted through 4 (four) field visits to Malawi and 4 (four) periods of activities in Japan, as outlined below:

Figure-1 Steps and Schedule of the Project



1.1.3 Target Area and Pilot Districts

The Project covered all educational districts in the Republic of Malawi as its target area and had six pilot districts, namely Nkhata Bay, Mchinji, Dedza, Mangochi, Thyolo and Nsanje. The pilot districts were selected from the Local Impact Area which was used as target districts by the decentralization project supported by UNDP.

1.1.4 Organization Structure and Staffing

(1) Steering and Technical Committees

The Project constituted a Steering Committee and a Technical Committee. The Steering Committee, chaired by Secretary for Education of MoEST, consisted of the directors of the ministry and the representatives of international development partners. Additionally, the representatives from the Department of Local Government and the Decentralization Secretariat were invited to the Steering Committee meetings. The Technical Committee included the Project counterparts, division managers and division planners, and the chairman was the Director of Education Planning.

The Project Team reported the progress of the Project activities to the Technical Committee on a regular basis. Any specific issues, on which the Technical Committee's advice seemed valuable, were raised during discussions with the Technical Committee. After discussions with the Technical Committee, and when decision making at the policy level was required, the Technical Committee called a meeting of the Steering Committee. The Project Team reported to the Steering Committee based on the advice of the Technical Committee.

(2) Counterparts

MoEST appointed the counterparts for the Project as follows:

List of Counterparts

Name	Responsibility
1) Dr. A. F. Kamlongera	Leader of the Counterpart Team, Deputy Director of Education Planning, MoEST
2) Mr. M. Nkhokwe	Education Planning Officer, South West Division Office
3) Ms. D. Khonje	Principal Education Planner, MoEST
4) Mr. K. Ndala	Education Planner, Shire Highlands Division Office
5) Mr. L. T. Haji	Planning Officer, MoEST

The counterparts and the Project Team members worked closely through frequent communication. Decision making on the Project was done through discussions between the counterparts and the Project Team.

(3) Core Trainers and National Trainers

The Project had 4 (four) Core Trainers, 3 (three) education planners from MoEST and a planning specialist from the Center for Education Research and Training (CERT) of the University of Malawi, and 14 National Trainers, who are division planners and district education officers of the pilot districts. They played a key role in the development of the training program and training materials and in conducting micro-planning training workshops and demonstration projects.

(4) Members of the Project Team

The Project Team was headed by a Team Leader, Ms. Yoko Ishida. The Project Team comprised of 9 (nine) members as listed below.

List of Project Team Members

Name	Responsibility
1) Yoko Ishida	Team Leader/Education Planning Specialist 1
2) Shigeko Mori Asher Ph.D.	Education Planning Specialist 2
3) Paul Parker Ph.D.	Micro-Planning Specialist
4) Kimihiko Yanagisawa	Socio-economic Analysis Specialist
5) Mikiko Nishimura	Administration/Finance/Management Specialist
6) Joseph Cohen Ed.D.	Curriculum Specialist
7) Masami Watanabe	Training Materials Specialist
8) Kilemi Mwiria Ph.D.	Training Program Specialist
9) Atsushi Fujino	Coordinator/Social Analysis Specialist

1.1.5 Main Activities

The main activities of the Project were summarized as follows:

(1) Training Needs Assessment

In order to prepare a more appropriate micro-planning training program and materials, a training needs assessment was conducted through data analysis and the conduct of the workshop with stakeholders during the Project's first visit to Malawi in December 2000. This assessment revealed that the main training needs with regard to division and district staff could be summarized in 5 (five) main categories: 1) enhancing understanding of the principles and processes of planning; 2) strengthening data collection skills; 3) improving capacity for data analysis and reporting; 4) improving communication across the various planning levels; and 5) enhancing understanding on the government decentralization policy.

(2) Development of Training Curriculum, Program and Materials for Micro-Planning Training Workshop

Based on the result of the training needs assessment and the data related to the current human resources, their capabilities, data collection and management, and other training programs, the Project Team developed training curriculum, training schedule and training materials for micro-planning training workshop in collaboration with the MoEST counterparts and the Project Core Trainers.

(3) Micro-Planning Training Workshop and Formulation of District Education Plans (DEPs) in the Pilot Districts

The Micro-Planning Training Workshop was conducted at the Malawi Institute of Management (MIM) in Lilongwe at the beginning of June 2001. The series of activities related to the training workshop are outlined below:

Activities:	Outline:
<u>Stakeholders Consultation:</u> District Commissioner's Office or Teacher Development Centers (TDCs) at Boma in the 6 pilot districts (May 31)	<ul style="list-style-type: none"> - Participants: about 30 stakeholders from each pilot district - Achievements and problems in primary and secondary education were discussed.
<u>Micro-Planning Training Workshop:</u> at MIM in Lilongwe (June 4 – June 15)	<ul style="list-style-type: none"> - Participants: 6 persons from each pilot district, 36 trainees in total (DEOs, CPEAs, heads from primary/secondary schools, Directors of Finance and Directors of Planning and Development from District Assemblies) - DEP drafts were formulated during the 2-week Micro-Planning Training Workshop.
<u>Stakeholder Feedback Meeting:</u> TDCs at Boma of the 6 pilot districts (June 19)	<ul style="list-style-type: none"> - Participants: about 30 stakeholders from each pilot district - Summary of the DEPs were presented and discussed. - Participants discussed the DEP drafts.
<u>Wrap-up Workshop:</u> At Le Meridien Capital Hotel in Lilongwe (June 28)	<ul style="list-style-type: none"> - Participants: DEOs of the pilot districts, Core/National Trainers, MoEST division managers, international development partners

(4) Demonstration Projects

Demonstration projects in the pilot districts were planned and implemented by the district level trainers who had been trained through the Micro-Planning Training Workshop in June 2001 in collaboration with the Project Core/National Trainers and the Project Team. These activities are summarized below:

Stages:	Major Activities:
I. Planning Stage:	<ol style="list-style-type: none"> 1. Identification of alternative projects 2. Preparation of project proposals 3. Preparation of implementation/financial plans
II. Preparation Stage:	<ol style="list-style-type: none"> 1. Conduct of a baseline survey 2. Preparation of training workshops 3. Preparation of the mid-term report
III. Implementation Stage:	<p>INSET Training (Nkhata Bay and Dedza)</p> <ol style="list-style-type: none"> 1. Computer Training (3 days) 2. Facilitators' Training (3 days) 3. Zone/Cluster Level Training (3 days) <p>School Census (EMIS) Training (Mchinji, Mangochi, Thyolo and Nsanje)</p> <ol style="list-style-type: none"> 1. Computer Training (3 days) 2. Trainers' Training (2 days) 3. Facilitators' Training (2 days) 4. Zone/Cluster Level Training (2 days)
IV. Evaluation Stage:	Evaluation activities were conducted in March 2002.

(5) Micro-Planning Training Workshop and Formulation of District Education Plans (DEPs) in the Non-Pilot Districts

The Micro-Planning Training Workshops for the non-pilot districts are outlined below:

Activities:	Outline:
<u>1st Batch of the Micro-Planning Training Workshop:</u> at MIM in Lilongwe (November 30 – December 11, 2001)	<ul style="list-style-type: none"> - Trainees: 3 persons from each of the 11 non-pilot districts of the Southern Region, 33 trainees in total (DEMs, CPEAs and Directors of Planning and Development from District Assemblies) - DEP drafts were formulated during the 10-day Micro-Planning Training Workshop.
<u>2nd Batch of the Micro-Planning Training Workshop:</u> at MIM in Lilongwe (January 28 – February 8, 2002)	<ul style="list-style-type: none"> - Trainees: 3 persons from each of the 16 non-pilot districts of the Northern and Central Region, 48 trainees in total (DEMs, CPEAs and Directors of Planning and Development from District Assemblies) - DEP drafts were formulated during the 10-day Micro-Planning Training Workshop.

(6) National Stakeholder Dissemination Seminar

The National Stakeholder Dissemination Seminar was conducted at MIM in Lilongwe on July 10, 2002. The objectives of the seminar were 1) to disseminate the accomplishments and experience of the Project to stakeholders; 2) to follow up DEP review and implementation activities in all districts; and 3)

to discuss the roles of the central, regional and local education administration in the context of decentralization. There were 52 participants including Core and National Trainers, MoEST personnel, DEMs and CPEAs from the pilot districts, representatives from the related government agencies and international development partners.

(7) Reports, Texts and Materials Prepared through the Project

Training Texts:	Unit I: Introduction to Micro-Planning Unit II: Data and Tools for Micro-Planning Unit III: Formulating the District Education Plan
Training Materials:	- Summary of “ <i>Education: Policy and Investment Framework (PIF)</i> ” - Socio-economic Profile of the Pilot Districts - Education Data Sheet by Zone and by District - School/Zone/Cluster School Census Summary Sheet - District Statistical Bulletin Format
District Education Plans (DEPs):	- Final Drafts of DEPs of the 6 (six) Pilot Districts - First Drafts of DEPs of the 27 Non-Pilot Districts
Reports:	- Progress Report I (March 2001) - Progress Report II (December 2001) - Final Report (August 2002)

1.2 National Development Goal and Strategy

1.2.1 Development Goal

The main government development goals are spelt out in *Vision 2020: National Long-term Perspective Study*. These goals are elaborated in four other documents, namely: *The Malawi Poverty Reduction Strategy Paper (PRSP)*; *The National HIV/AIDS Strategic Framework*; *The Decentralization Policy*; and, *The Education: Policy and Investment Framework 2000-2012 (PIF)*.

1.2.2 Strategy for Development Planning and Management

Malawi has adopted two approaches to pursue its development goals, which are spelled out in *Vision 2020* and the interim *PRSP* and explained in the above section. One is to adopt a strategy of decentralized planning and management where decision-making takes place from the bottom-up beginning with the participation of local community. The other is to introduce a framework for medium-term budget planning and spending to implement development goals.

In support of national goals and policies, the Decentralization Policy aims at greater efficiency and effectiveness by devolving authorities and responsibilities to a single district-level body, the District Assembly (DA). Under this Policy, democratic governance is promoted through people’s participation in decision

-making within a policy framework developed by the central government. It also calls for the elimination of any existing duplications between the center and local authorities by clarifying their respective roles and responsibilities. *Medium Term Expenditure Framework (MTEF)* is a three-year rolling expenditure framework. *MTEF* provides for a framework that requires the prioritization of activities and spending to help budgetary deficit decline to a manageable level of a single digit. It also requires the total expenditure requirement of integrating capital and recurrent spending to help ensure financial sustainability of development programs.

CHAPTER II EDUCATION SECTOR PROFILE

2.1 Overview of Education System

2.1.1 Education System

The education system comprises eight years of primary schooling, four years of secondary and an average of four years of tertiary education. Primary education, pre-school education and non-formal educational initiatives such as adult education fall in the category of basic education. There were 2,896,280 pupils in 4,481 primary schools in 1999. Secondary education is provided by conventional secondary schools, community day secondary schools (CDSSs), which were formally called Malawi colleges of distance education (MCDEs), and private secondary schools. According to the 1999 education statistics, 242,740 students were enrolled in secondary schools, of which 69% were in CDSSs. Tertiary education is provided by various educational institutions including primary and secondary teachers' training, and technical and vocational training colleges. The largest tertiary education institution is the University of Malawi (UNIMA). UNIMA was established in 1965 and has five constituent colleges with a student population of about 3,500.

2.1.2 Administrative Structure

MoEST is responsible for planning, managing and financing of the education sector in Malawi. The country is divided into six education divisions: North, Central East, Central West, Shire Highlands, South East and South West. Each education division administers several education districts (on average six districts). There are currently 33 education districts. A district education office administers several school zones, which consist of an average of 10-15 primary schools.

2.1.3 Major Educational Achievements

One of the major developments in the education sector has been the introduction of Free Primary Education (FPE) in 1994. FPE aims at education expansion and greater equity in access to basic schooling. The result of FPE was a massive increase in primary school enrollments from 1.9 million pupils in 1994 to 2.9 million in 1995. The gross enrollment ratio (GER) increased from 94% in 1993/94 to 134% in 1994/95. This rapid growth resulted in major quantitative and qualitative challenges for both the primary and secondary education sub-sectors.

2.1.4 Key Issues

(1) Access

With the introduction of FPE, it is estimated that almost 80% of Malawians of primary school age are enrolled in school. Nevertheless, there are still concerns of access for marginalized groups, the disabled and for those communities residing in remote areas. Overall, urban residents have more access to education opportunities than their rural counterparts. The issue of access becomes a greater concern at the higher levels of the education system. Only 18% of primary school graduates have access to secondary education and less than 0.5% of the 18-23 age group are enrolled in tertiary education.

Although Malawi has succeeded in drawing close to three million children into primary school, an average of 12% are dropping out of the system annually. The most disturbing feature of the primary school system is that enrollments decrease as pupils progress to higher standards. In the lower standards, class sizes are larger often by a factor of five or more when compared to standard eight and this indicates the magnitude of the attrition resulting from a high dropout rate.

An additional challenge facing the Malawian school system is pupil absenteeism. In some areas such as Mangochi, pupils can be absent from school for up to 3 months. As many as 50% or more of a class can be absent on a given day. The main causes of pupil absenteeism are: a) unattractive and unpractical classes at school; b) traditional practices such as initiation ceremonies; and c) engagement in income generating activities.

(2) Equity

Girls' enrollments at all levels of the system are lower than that of boys in primary and secondary education. The problem is more pronounced in remote rural areas. Less than 40% of the secondary school population is female. The situation is even more serious at the higher levels of education as less than 30%

of the tertiary education students are female. Women are also under-represented in vocational and technical institutions. Girls are more prone to repetition and drop-out than are boys and Malawian women form the majority of the country's illiterates.

There are also inequalities of access across socio-economic, racial, ethnic and religious groups, regions, and between rural and urban areas. At the regional level, in 1997, whereas the gross primary enrolment rate for the Northern Region was 143 % those of the Central and Southern Regions were 111 and 100 % respectively. These regional differences in the available education opportunity correspond to both the historical and economic advantage of the Northern Region, which was the first major beneficiary of colonial education development. Even more pronounced are the observed disparities between the urban and rural areas. Within regions, urban and rural areas as well as within social groups, there are obvious differences with regard to educational access.

Inequality is also apparent with regard to the physically challenged students. At all levels of the education system, educational facilities for handicapped students are either inadequate or lacking all together. As a result, children with disabilities are mostly kept at home. Parents of these children are also not encouraged to enroll them in school. In addition, the curriculum does not address the needs of this group of learners. Moreover, there are no specialized teachers for these youth at both the primary and secondary school levels and the available teacher training institution is inadequate for training adequate numbers of teachers. Another problem is that teachers trained to teach these students are not motivated enough as they have no clearly stated career path as well as opportunities for continued upgrading of their skills.

(3) Quality

As a result of FPE more and better facilities are required and the number of qualified teachers needs to be increased. In 1999 only 50% of all primary school teachers were trained. The average pupil:teacher ratio in primary schools was 72:1 while pupil-qualified teacher ratio was 143:1. The average number of pupils in a primary school classroom is 119. An average of 38 pupils share one desk and there are 48 pupils to a chair. These conditions make teaching and learning conditions uncondusive. It is estimated that only 4% of the schools in Malawi have access to electricity. A very limited number of primary school teachers are housed where they teach, which leads to a high level of teacher absenteeism. Teachers have limited opportunities to join INSET training courses.

(4) Relevance

The current school curriculum is blamed for its: emphasis on urban cultural norms; alienation of children from their cultural roots; encouraging rural-urban migration; failing to be local specific; continued emphasis on foreign languages as the medium of instruction; overcrowded nature; gender stereotyping; de-emphasizing practical science and mathematics in favor of a more theoretical orientation; paying limited attention to everyday concerns of health and environment; and for being too examination oriented. The curriculum is also blamed for not promoting functional survival skills such as vocational skills, entrepreneurship, understanding of environmental concerns, health and nutrition, civic and democratic education and special education among others.

The school curriculum is particularly weak with regard to the promotion of science and technology as evidenced by the modest amount of time allocated for the teaching of science and technological oriented curriculum in Malawi's schools. Because only about half of those studying science subjects pass national selection examinations and thus join higher educational institutions, Malawi's production of scientific manpower in the natural sciences is relatively poor. Low enrolments in scientific fields and poor implementation of the science curriculum are a result of: lack of/under-development of a scientific culture (at home, at school and in the wider environment); limited opportunities for learning at the primary and secondary school levels; lack of relevant teaching facilities (laboratories, equipment, books); inappropriate teaching methodologies which put more emphasis on theoretical knowledge and on the memorization of facts; lack of well qualified science teachers and technicians largely because of the poor remuneration of government employees; and limited access to modern information technology (IT) infrastructure.

Both the primary and secondary curriculum were reviewed and revised in 1991 but many of the above shortcomings remain. Even where appropriate changes may have been made, teachers and other educational officials have not been oriented on the implementation of the revised curriculum. Other curriculum-related challenges include: too few trained and qualified teachers to implement it; poor match between teacher training and curriculum goals and methods; inadequate teacher supervision; and insufficient instructional materials which are poorly distributed.

(5) Management and Planning

In the School Census activities, education data are collected at the school-level by school heads and sent to DEMs through PEAs, and then to division offices. Division offices have division planners and statisticians, who were trained in the

School Census and/or EMIS projects. They have capacity for data analysis and data management with computerized systems.

However, at the district office level, DEMs and PEAs have less opportunity to receive training in data analysis, management and planning and their capability in these areas is poor. Access to education data, which they collect, is quite limited.

(6) Finance

In the fiscal year 2000/01, 28% of total government recurrent budget was allocated to the education sector. Of this amount, 59% went to the primary education sector, 8% to tertiary education and 3% to secondary education. Out of the education recurrent budget allocation to primary education 90% is used to cover salaries for teachers and supporting staff; only 10% of the education recurrent budget is available for quality inputs.

In budget allocations to each district education office, top-down approaches are currently applied; the budget and finance section of MoEST at the headquarters prepares an annual budget plan based on the national policy and the *PIF*.

Education division and district education offices prepare and submit district-specific budget plans. However, these plans are not reflected in the actual budget plan. This district and schools are allocated limited financial resources by the central government for their development activities. They are, therefore, dependent on other funding sources such as MASAF (see page 15) and the District Development Fund (DDF), both of which also benefit sectors outside of education. DDF was set up by GoM and is controlled and managed by District Assemblies (DAs) (former District Development Committees). GoM, UNCDF and UNDP have been the main contributors to DDF.

In budget allocations to each district education office, top-down approaches are currently applied; the budget and finance section of MoEST at the headquarters prepares an annual budget plan based on the national policy and *PIF*.

2.2 Education Policy and Strategy

2.2.1 Sector Investment Program (SIP) for Education

The Government has formulated a national education strategy, *PIF*. *PIF* outlines seven main objectives for the education system. The first objective is to *improve access to educational opportunities* for all levels of the education system. At the basic education level, the ultimate goal is Universal Primary Education (UPE), which the government is advancing through the Free Primary Education, introduced in 1994. At the primary education level the goal is to achieve a net

enrolment ratio (NER) of 95% in all districts by 2012. For secondary education, the aim is to increase the GER ratio from the current 18% of the relevant age cohort to 30% by 2012. Participation in tertiary education is to be raised from the current 0.3 % to 1%.

The second *PIF* objective is to *improve the equity of access and outcomes* particularly for economically and socially deprived groups and regions. In view of this, the *PIF* identifies relevant actions for improving the participation of girls and women, children with special needs and other disadvantaged youths and that of rural communities at all levels of the education system. *PIF*'s third objective is to *enhance the quality of education* offered in the country's education institutions. The fourth objective of the *PIF* is to *improve the relevance* of Malawi's education system. The intention is to have the country's education programs be more in tune with the surrounding local, national, regional and international socio-economic and political realities. Fifthly, *PIF* delineates measures for strengthening the capacity of MoEST and relevant regional and local institutions *to manage educational programs in a more cost-effective manner*. The sixth *PIF* goal is the *strengthening of the national education system's planning capacity*. Among other strategies, this calls for training educational staff in data collection, analysis and use. The seventh *PIF* goal is to *encourage those in society who can afford it to share in the cost of education provision* while ensuring that the poorer sections of society are not forced to drop out of school because of inability to pay.

2.2.2 Decentralization of Education Services

The role of the central and district local government in education has broadly been identified. DAs are responsible for the provision of pre-primary, primary and secondary education, and vocational and adult literacy training. DAs are to plan and implement these education services in line with *PIF* for education developed by central government. Besides policy formulation, MoEST is responsible for curricular development, the inspectorate, standard setting, and training. To carry out these professional responsibilities, MoEST retains its direct links with local authorities.

The detail of responsibilities and authorities to be shared between the central and local government is being developed. It will specify which education functions and financing is to be assigned to the district levels and what steps and procedures will be available for local government to manage the assigned education services. As explained earlier in the context of decentralization, clear delineation of responsibilities and authorities by different levels of administration is essential for successful implementation of shared responsibilities.

2.2.3 MTEF Experience in Education

The main achievements and constraints in the implementation of MTEF-based education budget process are closely linked to overall MTEF implementation experience in the country, which was explained in the earlier section. Important areas of achievements and constraints in education are shown in Table-1.

Achievements and Constraints in MTEF Implementation

Achievements	Constraints
Policies are articulated in PIF	Budget ceilings are advised later in the process than expected under MTEF
MoEST budget coordination committee has been set up	Prioritization process is unclear
Participatory bottom-up process has been adopted for ABB preparation	Budget cycle coordination is weak within MoEST and between MoF and MoEST
Districts have prepared DEPs according to ABBs	Current accounting system does not allow for ABB entry

2.3 Programs and Projects

2.3.1 EMIS Project

MoEST implemented the national rollout of Education Management Information System (EMIS: school mapping exercise) with technical and financial assistance of Dfid, DANIDA and USAID. This was not done under the common basket of international development partners.

Training focused on the quality improvement of data collection. Data input and analysis were mainly handled by international consultants. Training of division planners in data collection with a school mapping questionnaire commenced in February 2001. All Phases of the exercises were completed in January 2002.

MoEST initiated the 2001 School Census exercise in November 2001. The Census covered both primary and secondary education. The census questionnaire was prepared by MoEST in collaboration with international development partners. Copies of the questionnaire used for data collection were produced with the financial assistance of USAID. Information collected through the Census is the basic data for EMIS.

2.3.2 Primary Community Schools Project

The Primary Community Schools Project (PCOSP) aims to develop and disseminate cost-effective and replicable approaches for the delivery of effective

primary education. Begun in 1995, it has been supported by DfID with an overall budget of £18.28 million. Originated as a response to the GoM's policies to increase access to schooling and to empower communities to play a central role alongside the government in delivering primary education, PCOSP has had three strands. These include construction, community participation, and teacher and school development. Whereas many community-oriented school construction projects such as MASAF emphasize community contribution in actual construction such as brick mounding, PCOSP promotes full community participation in school management with almost no participation in the actual work for construction.

2.3.3 Chiradzulu Initiative

The Chiradzulu Initiative (CI) emerged from the work of the nationwide PCOSP, using unspent funds from this program and drawing on its achievement. It was a district program to improve the quality of education in the Chiradzulu district of the Shire Highland education division. Like PCOSP, the project had three components, that was, teacher and school development, community participation, and upgrading of learning environment. In addition, it sought to strengthen the capacity at the district education office. Chiradzulu was chosen since it was a pilot district for PCOSP, its sister project called Malawi Schools System Support Program (MSSSP), and for the "school mapping exercise".

2.3.4 Capacity Building in Secondary Education

MoEST started the school development project in secondary education under the technical and financial cooperation of DANIDA. Grouping of schools into clusters and capacity building in school management and planning at the secondary school level have been conducted in these projects. The pilot project of the school development project has taken place in several pilot districts including Salima.

DANIDA has been supporting quality improvement in secondary education such as teacher training (especially at CDSSs), curriculum development, instruction materials development, strengthening of quality assurance, and support to girls' education. CIDA has been training of CDSSs teachers in STEP and improvement of textbook provision.

2.3.5 Malawi Social Action Fund

GoM set up the Malawi Social Action Fund (MASAF) in 1995 as a key poverty alleviation strategy designed to address community social needs through self-help empowerment processes. GoM obtained a credit from the World Bank

equivalent to USD 56 million in 1995 to implement the MASAF project. Due to the overwhelmingly high demand for funding, a second credit from the Bank equivalent to USD 66 million was provided in 1998 to implement MASAF II project. By November 2000, MASAF had funded a total of 3,968 projects at a cost of MK 2,952 million. MASAF operates three project components: the Community Sub-Project (CSP); Public Works Program (PWP); and Sponsored Sub-Project (SSP). The education sector projects are undertaken predominantly under the CSP component, which emphasizes the creation of socio-economic facilities directly benefiting participating communities and the promotion of participatory approaches toward achieving self-managed development at the grassroots level.

2.4 Training Needs Identified for the Project

Successful implementation of the micro-planning project is dependent on the availability of a competent team of central and local level officials. Although several donors have done some work to strengthen the capacity of planning staff in the use of data for planning, the coverage of these efforts has been limited, and most MoEST staff with whom this Project has to work has not yet been reached by the donor efforts.

In view of this, the micro-planning team carried out assessment of training needs among planning officers, DEOs, CPEAs and teachers in the districts that are targeted by the project. This assessment was carried out in two main phases. In the first instance, the Project Team visited the division offices and the offices of the Project pilot districts and interviewed division managers, division planners and DEOs on the areas where they consider additional skills are necessary to prepare them for the micro-planning project. Secondly, the Team took advantage of a micro-planning kick-off workshop to gain further insights on the training needs of those to be involved in the Project.

The data gathering exercise revealed that the main training needs with regard to division and district staff can be summarized in five main categories, namely: (1) enhancing understanding of the principles and processes of planning; (2) strengthening data collection skills; (3) improving capacity for data analysis and reporting; (4) improving communication across the various planning levels; and (5) enhancing understanding on the decentralization policy of the government of Malawi.

CHAPTER III CAPACITY BUILDING FOR MICRO-PLANNING

3.1 Framework for Micro-Planning Training

Micro-planning in the Malawi context has been defined as:

Planning at the lowest level of the educational management system as a means of systematically bringing together human and physical resources in a timely schedule to address development needs and requirements. Micro-planning in the Malawi context of this Project is planning conducted at the district level. It is hoped that the micro-plans that will result from this project will have benefited from the participation of stakeholder groups at the local level.

The objective of the micro-planning training was defined as:

Institutional strengthening of the central and district planning systems for primary and secondary education. The specific focus of the Project is capacity building in the areas of planning and implementing Education Development Plans (DEP) at the district level.

The four approaches to micro-planning training were to:

- (1) Develop and expand the capacity of local education authorities to plan the provision of physical and human resources and also identify efficiency and effectiveness measures required to improve primary and secondary education. This was done through a collaborative and sustainable organizational structure, involving the relevant government's divisions and departments, international development partners, local/international NGOs;
- (2) Implement the Project within the socio-economic and education context of Malawi, in keeping with local culture, needs and available resources;
- (3) Expand through participation, the potential for community stakeholder involvement in the planning process to foster a community sense of ownership in the development of local schools; and
- (4) Enhance the capacity of all those involved in local planning from national to local levels, including the supportive local community, to manage, understand and use all planning related data effectively in making judgments and decisions with respect to the:
 - 1) Identification of educational needs;
 - 2) Assessment of physical and human resources required to meet those needs;
 - 3) Development of sustainable planning strategies, which include potential sources of support, an action or implementation plan and

schedule; and

- 4) Implementation of a monitoring and evaluation system to be able to assess periodically the extent to which plans are being implemented and objectives and targets met.

During the development of the framework, the JICA Project Team agree on a set of planning and operational guidelines that were a fundamental part of the training program design and implementation and of the development of District Development Plans (DEPs). They were that:

- (1) Malawians, with JICA team assistance, would take the leadership in carrying out the training programs, so that a sustainable sense of ownership for the Project results would be established;
- (2) micro-planning training would be coupled with the production of a draft DEP for each of the 33 districts;
- (3) DEPs produced by pilot and non-pilot districts in the training would be of sufficient quality and depth to be presentable to district level stakeholders for inclusion as part of the District Development Plan (DDP) to be considered for support by district assemblies;
- (4) all training would be more effective if “learn by doing” instructional methods were used. Trainees would put together their DEPs on a step-by-step basis primarily in small group work with the help of national and core trainers and technical advisors;
- (5) training materials and the training program curriculum would be more practical rather than theoretical;
- (6) data and information would be assembled prior to the training by the Project Team to make the DEP database as easily understood and used by trainees;
- (7) trainees would include not only District Education Managers (DEMs) and other persons representing education, but also selected persons from district assembly to insure cooperation and coordination in the implementation of plans;
- (8) all training programs would be more effective by bringing pilot and non-pilot district level trainees to a central location, the Malawi Institute of Management (MIM), for an intensive two weeks of training and DEP development;
- (9) a wide range of district level stakeholders would be involved in defining issues and problems and suggesting solutions; and
- (10) DEPs would be written and presented in such a way as to be easily read and understood by a variety of stakeholders and decision makers.

The Micro-Planning training to produce DEPs for all 33 of the districts in Malawi was carried out in a series of training workshops as follows:

- 1) February 19 – 24, 2001 – National Trainers’ training for Core and National Trainers
- 2) June 4 – 15, 2001 – district level staff from the six Pilot Districts
- 3) November 30 - December 11, 2001 – district staff from 11 non-pilot districts (Southern Region)
- 4) January 28- February 8, 2002 – district staff from 16 non-pilot districts (Northern and Central Regions)

3.2 Curriculum and Materials

Although there were modifications made in the content, the basic structure of the curriculum remained the same throughout the various training workshops and activities. The curriculum for micro-planning conceptualized and developed by the Core Trainer Team and the Project Team was straight forward. The materials were organized around three instructional units printed in a Micro-Planning Training Manual for each trainee. The three Units were:

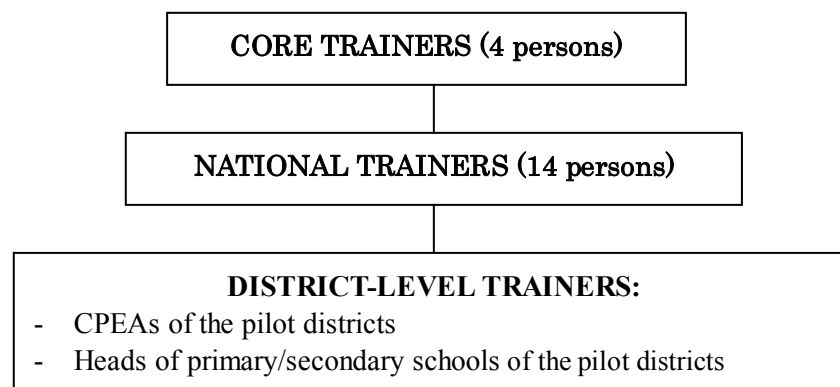
- Unit I Introduction to Micro-Planning;
- Unit II Data and Tools for Micro-Planning; and
- Unit III Formulating a District Education Plan.

Other than the Manuals training materials included the data and information related to each district required for planning, such as EMIS district data summaries, calculations of key indicators, socio-economic profile information, a unit cost for budgeting and a summary of the PIF.

3.3 Training Structure and Staffing

The training structure was developed, with some minor revisions later, in the planning stages of the Project from October to December 2000. There were three levels of trainers, Core Trainers, National Trainers and District-Level Trainers for pilot districts as shown in Figure-1 below.

Operational Structure and Staffing in Micro-Planning Training



3.4 Micro-Planning Training Workshop

(1) Pilot District Micro-Planning Training

The objectives of this Micro-Planning Training Workshop in the pilot districts were to:

- 1) develop the capacity at each pilot district for education officials and others involved in the local planning process to do micro-planning and produce DEPs in the future on their own;
- 2) produce at the end of district level training a draft DEP in each of the six pilot districts to be considered favorably by each of their district stakeholders (educators, administrators, public officials, community and political leaders) and district assemblies;
- 3) develop a sense of ownership of the DEPs by the district education offices and local stakeholders in each of the pilot districts;
- 4) develop the capacity of local educational officials to plan at district level by upgrading their skills in the use of educational and socio-economic data and school mapping in order to: assess, continuously, needs and gaps in resources; devise improvement strategies to address needs; establish development targets; cost development strategies on a three year schedule Medium Term Expenditure Framework (MTEF); and develop implementation and action plans;
- 5) develop the capacity at district level for education officials and others involved in the local planning process to be capable of promoting and negotiating their plans with their stakeholders to obtain support for implementation of their plans; and
- 6) assist in the identification of potential demonstration projects to be carried out between August and December 2001.

The Pilot District Training began with one day pre-planning stakeholder consultation workshops held in each of the pilot districts either on May 31 or June 1, 2001. Prior to the workshops, the stakeholders in each pilot district were asked to complete a survey questionnaire to identify their opinions as to primary and secondary school improvement constraints and development needs. The identified needs were analyzed in the two week Micro-Planning Training Workshop in Lilongwe in June to determine the extent to which needs identified were supportable by district data and information. The needs, then, were put to an objectivity test by the district planning team selected to participate in the Workshop. After the draft DEPs were completed, the stakeholders were re-assembled for a “stakeholder feedback meeting” to review them and offer input as to the extent to which they were supportable plans.

When the Micro-Planning Workshops began in Lilongwe on June 4, district planning teams were organized into the six pilot district personnel composed of the District Education Managers (DEM) or Assistant DEM (ADEM), if there were no DEM, Coordinating Primary Education Advisor (CPEA), a primary school head teacher and a secondary school head teacher. In the second week, a Director of Planning and Development (DPD) and a Director of Finance (DF) from the District Assembly office joined the teams. The Project Team members, Core and National Trainers were added to each group, as well. The full teams, including technical advisors and national/core trainers numbered approximately ten persons each.

(2) Non-Pilot District Micro-Planning Training

Following the successful completion of micro-planning training in the pilot districts, the Project was now in a position to design a slightly modified version for training in the remaining 27 non-pilot districts of Malawi. Because the number of non-pilot districts to be trained was so large, it would be impossible to train all the key personnel at once, as it was done for the Pilot Districts. Therefore, it was decided that the training for the remaining 27 districts would be best carried out in two batches: one batch of 11 from the Southern Region and a second batch of 16 districts from the Central and Northern Regions. The first batch was trained in a ten-day workshop between November 30 and December 11, 2001. The second batch of 16 was trained between January 28 and February 8, 2002.

CHAPTER IV FORMULATION OF DISTRICT EDUCATION PLANS

4.1 Approaches to DEP Formulation

As explained in the previous chapters, the District Education Plans (DEPs) were one of the main outcomes of the micro-planning training program.

The formulation of the DEPs was supportive of the goals of *PIF* in a number of respects. First, the DEPs address the key educational issues identified for attention by the PIF. To ensure that the PIF norms were respected during the formulation of the DEPs, in addition to the work sheet, district level officers were also provided with the PIF document, which they used during the analysis of their respective district situations. In addition, the project prepared an abridged version of the PIF, which was distributed to all district level officers involved in the preparation of the DEPs.

Objectives of DEPs: In the context of decentralization, the objectives of the DEPs are fourfold. In the first place, they are aimed at providing a medium-term 3-year strategy for the district education program and 1-year action plan. Second, DEPs will improve coordination of the various educational interventions in the district. Third, the plans will present a mechanism for monitoring and evaluating district education progress. Fourth, the DEPs will promote popular participation of the various stakeholder groups in the district's education at development.

4.2 Component of District Education Plans (DEPs)

The DEPs consist of four chapters as shown in Box:

Contents of the District Education Plan (DEP)

Contents of the District Education Plan (DEP)

Chapter I. Introduction

- 1-1 Rationale for the DEP
- 1-2 Role of Education in District Development

Chapter II. District Socio-Economic and Education Profile

- 2-1 Socio-Economic Conditions
- 2-2 Education Provision
- 2-3 Major Educational Achievements
- 2-4 Education Problems and Priorities
- 2-5 Educational Resources and Finance

Chapter III. Stating Policy Objectives, Strategies, Indicators, Targets and Resources Needs

- 3-1 Policy Objectives
- 3-2 Strategies
- 3-3 Indicators
- 3-4 Targets
- 3-5 Resources, Costing and Budgeting

Chapter IV. Implementation Schedule

- 4-1 Implementation Schedule
- 4-2 Administrative Structures
- 4-3 Monitoring and Evaluation

CHAPTER V DEMONSTRATION PROJECTS

5.1 Summary from Inception Report Until the End of Progress Report II

The Project included implementation of demonstration projects in the six pilot districts with augmentation between April and November of 2001. This was to coincide with the Project Team's second visit. The outline of demonstration project activities were:

- (1) Formulation of Demonstration Projects: This occurred during the first two-week training program involving the six pilot districts. In plenary session, participants identified key areas of interest where pilot activities would complement their planning. Upon returning to their home districts, each site prepared one or more costed proposals for the pilots in which they were interested and submitted them to the Project Team.
- (2) Selection of Demonstration Projects: The Project Team identified two projects from among the proposals generated and assigned four districts to one (Improving School Census Capacity or EMIS) and two districts to the other (In-Service Training for School Managers or INSET).
- (3) Official Agreement: In September MoEST and the Project Team agreed on the budgetary arrangement based on the demonstration plans prepared by each pilot district. This was followed by each district completing a costed and detailed implementation plan.
- (4) Baseline Survey: Based on the nature of the pilots, a baseline survey instrument was constructed and surveys were conducted by DEMs, PEAs and cluster heads. Separate surveys were constructed for the two different demonstration projects – INSET and EMIS. About 30% of all participating schools were surveyed. Results of the survey are reported on pages 33 through 35 of Progress Report II.
- (5) Training Programs and Materials: Training was designed throughout September and October of 2001. Once materials were prepared utilizing a learning-by-doing approach, district trainers were selected and trained.
- (6) Training: Three representatives from each of the six districts received computer training from October 29 to 31, 2001 in Lilongwe and conducted by a local computer training company, Afcor. EMIS demonstration project training took place from November 2 to 11, 2001 while INSET training was divided into two separate sessions held on November 7 to 9, 2001 and again on December 2 to 9, 2001. Computer training covered basics including Windows, word processing and spreadsheets. EMIS training was built around the school census questionnaire and focused on the reasons and methods for accurate data collection. The INSET program centered on issues related to what makes an effective school, how to keep accurate records, and how to keep attendance registers. This training was conducted

in the districts and conducted by core, national and district trainers for EMIS and district, zonal and cluster staff for INSET.

5.2 Post Demonstration Survey

One key lesson learned involved the baseline survey. The baseline survey was designed as a self-report form raising questions as to the accuracy of the information collected. It was recommended that a new form be designed for conducting the post demonstration survey, a suggestion that was implemented. Unfortunately, it is not possible to compare results of the baseline survey directly with those of the post demonstration survey. The new survey was constructed, however, to make comparisons between pre and post demonstration activities.

It was possible to follow the same procedure with both types of pilots – EMIS and INSET – although there was variation in the types of information that was being captured. Procedurally, each demonstration project yielded quantitative and qualitative results. Thus, it was necessary to design collection tools that reflected data that could be culled from documents (quantitative) as well as data that needed to be gathered through focus group interviews and observations (qualitative). In preparation for the survey, a manual was prepared for training surveyors in the procedure for implementation.

The survey teams were chosen from the pool of core and national trainers. A total of 12 were chosen, two assigned to each district. There were four steps in the procedure:

- (1) Conduct focus group interviews in each of the six districts.
- (2) Complete a quantitative data sheet of the demonstration project.
- (3) For EMIS conduct school visits to verify and compare school census data.
- (4) For INSET conduct school visits to assess the impact of training on record keeping.

After the completion of the data collection, all instruments were organized by district and brought to Tokyo where the Project Team organized and evaluated results which appear in the following paragraphs.

5.3 Results and Interpretation of Post Demonstration Project Data

(1) Results and Conclusions Concerning INSET Demonstration Project

The purpose of the INSET demonstration project was to train school managers in management of school records and then improve collaboration with the community. The project targeted primary and secondary school heads and community representatives. To achieve this, training materials were prepared;

computer training for staff at the DEM office was conducted; facilitators trained; and head teachers and community representatives trained. As outcomes, an increased number of permanent registers were to be used by teachers resulting in timely and accurate data; communities were to be involved more in using data to learn about their children and to cooperate with teachers in improving learning environment; and accurate information was to help school managers in planning and decision making.

They state that accuracy of records has been increased and that records can be used to improve the relationships between the school and community. Stakeholders state that relationships, once adversarial, are now cordial. Accurate record keeping is given as the reason. Good records are used to improve communication between school committees, head teachers and teachers.

Some of the new behaviors that were mentioned include the following. School heads are more organized; head teachers are requiring teachers to keep accurate records updated daily, weekly and monthly depending on the type; head teachers plan to check records regularly and require deputies and section heads to do the same; decision making has been simplified and based on the data resulting from record keeping; attitudes of all stakeholders have been positively changed; records are helping with distribution of resources; school committees are making positive suggestions to improve schools; roles and responsibilities have been clarified and communities now see the schools as belonging to them.

Computers appear to be in use in both districts. Three staff from each district have been trained for multi-tasks and the computer is being used for accounting, record keeping, and word processing. The concern here will be when the computers and peripherals need servicing. Will the district office have a budget for repair and replacement? There is no doubt that as personnel become more adept at computer applications there will be demand for more time on the computer. Given that there are multiple users at each site, this will likely happen soon.

The major concern here is sustainability. The groundwork has been established as part of the demonstration project, and all have stated in the focus group survey what reflects the intended outcomes both in attitude and behavior. Community involvement gains its own momentum which should help sustain the effort. It is the responsibility of the district, and PEA/cluster heads to monitor continued record keeping and community involvement. The project is not in a position to verify sustainability of attitude and behavior change outcomes.

(3) Results and Conclusions Concerning EMIS Demonstration Project

The purpose of the EMIS demonstration project was to build capacity related to data collection, interpretation, use and management; establish a school registration system; and strengthen data collection and management capabilities for the 2001 school census. Targeted stakeholders included DEM staff members, and primary and secondary head teachers and their deputies. To achieve this, training materials were prepared; computer training was conducted; facilitators were trained; head teachers were trained; 2001 census forms were completed; zone/cluster level forms were designed and then completed; and a District Statistic Bulletin was to be prepared by the district office.

One measure of overall success was to construct a measure of accuracy and compare accuracy levels before and after the demonstration project. This was done by asking participants completing a school level questionnaire and responding to certain questions related to accuracy. Then, accuracy was presented as a percentage. When subtracting percentage of accuracy between 2001 and 2002 one could estimate the change. Results of this exercise were mixed. Across the four districts, three districts indicated increases in accuracy while the fourth actually reported a decrease in accuracy (+31%, +14%, +9%, and -2%).

Head teachers reported positive impact in use of attendance records. They noted that accurate and complete use of the registers results in multiple applications of data. Results can be used to explain poor student performance; provide information on dropouts, aggregate differences between girls and boys across a number of criteria; identify specific problems; improve planning; assist in counseling; conference with parents; identify data patterns; and reduce transfer registration problems. Heads stress the need to use them on a daily basis. One interesting outcome is that teachers use of registers to call out student names to check attendance has reduced the absenting rate.

Districts reported the following about using the computers donated by the project. In three districts, computers were reported to be in regular use while in the fourth district lack of electricity prevented use. The three sites reported multiple applications of the computer including word processing, data storage and retrieval, and accounting. Several people including PEAs have access to the computer and it was reported their jobs were made easier as a result of having access to the computer. The quality and accuracy of output was reported to have increased by using the computer. No specific problems were reported at these three locations.

(4) Wrap-up

Although the two demonstration projects had different approaches, results suggest similar outcomes across a number of domains. Most of the responses were positive and in support of using different tools such as attendance registers, data summary sheets, and computers to increase efficiency and accuracy of data. Building on this, results that were generated from these various tools can be used to build linkages among stakeholders. This improves such processes as communications, decision making, consensus building, reporting, and problem solving. Negative results center on such issues as inadequate time, not anticipating certain expenses, using a survey approach that may be suspect, and short timeframes for demonstrations so that sustainability is not a part of measurement. Nevertheless, there is much here to build on in future activity. It is necessary to focus on attitude change and behavior change if the educational system is to be improved. Both demonstration projects focused on this as a primary output. The ultimate outcome has yet to be determined.

CHAPTER VI EVALUATION

6.1 Evaluation

6.1.1 Project Objectives

The main objective of this project was institutional strengthening of the central, regional and local management of Malawi's primary and secondary education sub-sectors. More specifically, the Project aimed at capacity building in the areas of planning and implementing education development plans at the district level. To achieve this objective, the project adapted four main strategies, namely:

- a) Formulation of a collaborative and sustainable organization structure for the development of the primary and secondary education sub-sectors with GoM and in collaboration with international development partners, local/international NGOs, and civil society;
- b) Use of an implementation strategy that strove to improve the beneficiaries' understanding of the value of local-level planning based on effective data management;
- c) Upholding and respect for local needs and potential and promotion of community participation in the planning and implementation of all the Project's activities; and

- d) Generation of practical outputs that point out future ways of improving the primary and secondary education sub-sectors by taking advantage of the support being rendered by other development partners.

In this sub-section, the performance of the Project is assessed from the points of view of: (1) its effectiveness in attaining its objectives; (2) the efficiency with which available project funds and time were used; (3) the quality of its outputs and their relevance for Malawi; (4) the extent to which its benefits were equitably distributed; and, (5) its impact on Malawi's education system.

6.1.2 Effectiveness

There is strong evidence to show that the project was highly effective in strengthening the institutional capacity of MoEST. This was made possible through the various micro-planning training workshops and demonstration projects implemented through the project. Table 6-1 shows the main outputs of the project that relate to its institutional strengthening objective.

Project Training Accomplishments

Project Activities	Outputs	No. and % of Female
Production of training materials	Training manual (Units I, II & III); PIF Summary; socio economic profiles; educational indicators; and maps	Not Applicable
Training of national trainers	14 Education officials (1 Planner from HQ, 7 Division Education Planner Planners and 6 District Education Managers of the Pilot Districts)	3 (21%)
Training district level staff on micro-planning (Pilot districts)	30 Education officials (3 per district - CPEA, 1 primary & 1 secondary school head) ; Director of Finance; Director of Planning and Development	10 (16%)
Training of district staff on micro-planning (non-pilot districts)	81 officers from 27 districts (3 per district - DEM, CPEA; Director of Planning and Development	13 (16%)
Training of local level staff (EMIS)	1,322 zone/cluster and school level staff	330 (25%)
Training of local level staff (INSET)	499 zone/cluster and school level staff and community members	125 (25%)

The main output of these workshops was a draft DEP by all the 33 districts. Local stakeholders and district assemblies consider these DEPs to be of sufficient depth and quality. Moreover, those trained through the workshops, indicated through workshop evaluations, that they are now more confident of using data for planning as well as of defending the DEPs they prepared among the various stakeholders. In addition, they added that the training improved their

capacity to convert raw data into indicators, to employ indicators and data in analyzing needs and problems and to use these tools in developing and documenting their DEPs.

Training was also accomplished through the training activities of the demonstration projects in the six pilot districts. The two demonstration projects, which focused on the strengthening EMIS and the management of school records (INSET) trained a total of 1,322 educational staff from the district, zone and primary school levels. The INSET project trained further 398 community representatives in a bid to strengthen school-community relations with regard to school record keeping.

6.1.3 Efficiency

The project was implemented according to its planned schedule despite the fact that the key condition of having the school-mapping component completed before the launch of this Project in November 2000 had not been achieved. To ensure that project activities were not delayed due to lack of school census data, the project team had to carry out its own survey. In addition, a postal questionnaire focusing on educational problems and achievements was administered with the hope of maximizing data collection and appreciating more the problems of each respective district as seen from the perspective of stakeholders. It is also to the credit of the Project that additional activities were accomplished within the original project budget and time schedule. The most expensive of these activities was training and production of DEPs in 27 non-pilot districts. Cost-effective use of available resources was also enhanced by the use of MIM in Lilongwe for all the training workshops, a factor that led to savings in time and financial resources. Efficiency was also enhanced by the optimum use made of local resource persons with regard to the scheduling of project activities, the preparation of training materials, the conduct of micro-planning training workshops and for the monitoring of field activities. Their better knowledge of the country's education system as well as of the logistics involved in the implementation of project activities helped to cut down on project expenses.

6.1.4 Quality and Relevance

Overall, trainees, MoEST and JICA found the Project to be of high quality and to have responded to Malawi's educational planning needs. Outside of MoEST, the Project was seen to be consistent with the GoM decentralization policy. Thus, the training program incorporated this aspect and was always the first topic trainees were introduced to. Besides, during the training program, the Project team made efforts to collaborate with the Decentralization Secretariat and the

District Assemblies to ascertain that training objectives remained synchronized with those of the government policy on decentralization. In fact, the very development of district education plans is the best manifestation of the Project's furtherance of the goals of decentralization.

Relevance of the training program was further enhanced by the system of local stakeholder consultation with regard to the preparation of DEPs. The six pilot districts' pre and post micro-planning training workshops for stakeholders were judged through workshop evaluations to have been a critical ingredient in developing DEPs. This is because the grassroots consultation process made possible the inclusion of the problems identified by stakeholders as well as the means for addressing them in the DEPs. Stakeholder views were also reflected in the revised pilot district DEPs. Although the non-pilot districts did not use face-to-face stakeholder meetings to identify needs and suggest solutions as was the case with the pilot districts, all 33 districts conducted a survey of stakeholder opinions as the basis for their DEPs.

The organization of the training program did much to enhance its quality and relevance. First, its implementation was very carefully planned with every step showing a logical progression from one stage to another. Thus, training did not commence until training needs had been identified through interviews with relevant stakeholders and after a review of previous training programs in Malawi. Included in the training content were all the key elements of data collection, analysis and use for planning and management. The program also exposed trainees of the pilot districts to the use of computers for data analysis, storage and disseminating education data. Second, the selection of trainers was done after close consultations with MoEST. The qualifications and experience of potential trainers were the key factors determining their selection.

Third, the training materials used reinforced the quality and relevance of the training program. These materials were produced locally through the Project after much consultation with the local core trainer's team who vetted their quality and relevance for the Malawi setting. Moreover, these training materials were hailed as simple, practical and user-friendly tools for educational planners. In addition to these materials, the project did also avail both the long and shorter versions of the *PIF* to trainees in order to ensure that they related their DEPs to the national educational goals and targets as stated in the *PIF*. Trainees were provided with their respective districts' EMIS data to ensure that their plans were based on the actual district situation. However, there were problems of inaccuracies and incompleteness with much of the EMIS data available for the training. This problem was somewhat alleviated by the fact that

trainees brought their own primary data to the workshop and by the availability of the data collected through stakeholder consultations.

The quality of the 33 DEPs produced through the Project shows some unevenness with some DEPs being clearer in presentation, better documented with data, and more realistic with respect to strategic objectives. The weaknesses are however minor and all the 33 DEPs are of sufficient depth, quality and relevance to be considered favorably by stakeholders and district assemblies. If they had not met the tests of quality and relevance, the stakeholders at the local level would not have favorably received them. The DEPs are also regarded highly at the national level with respect to quality and relevance, as they are being held up as a model for other sectors to follow in contributing to District Development Plans (DDPs). It is due to this recognition that MoEST is insisting that DEPs should be the blue prints for future education developments in the districts.

6.1.5 Equity

Although an effort was made to address the issue of gender equity, the project was not entirely successful in this regard. This is especially the case with regard to the selection of core and national trainers. The initial group of core trainers did not include a single woman. However, two women later joined this core trainers team in place of two male trainers who enrolled for graduate studies in the USA. The same gender imbalance characterized the national and district level trainers. The training workshops were overwhelmingly male, as trainees were chosen due to their position in the districts. Thus out of 120 district trainees from the 33 districts of the country, only 23 (19%) were female.

Aware of the equity implications of female under-representation in education and high ranking occupations, all the 33 DEPs address the issue of gender imbalance in access and retention in the education system in the policy objectives and strategies relating to gender equity. Other types of equity that are addressed by the DEPs are those related to unequal access to educational opportunity and retention between rural and urban children, the physically disadvantaged and the poor.

6.1.6 Impact and Sustainability

Reports from a variety of stakeholders attest to the extent to which this project has had a positive impact within and outside of Malawi's education sector. In Malawi, education is the first sector where all districts have prepared their sector plans. As a result, the DEPs are being used as a guide for the other sectors. They are also being used as the main contribution for the education sector in the

District Development Plans (DDPs) that are in the process of being prepared in the whole country. In this way, the DEPs are having a particularly significant influence on the country's decentralization policy. Within education, MoEST and development partners have committed themselves to using the DEPs as the guide for future educational investments in all the country's districts. Already DfID has made this commitment to MoEST and other donors are expected to follow suit. Development partners are also using the *PIF* summary developed through the Project to disseminate government policy on education and others who are involved in school registration related projects are keen on using the attendance registers forms supplied by the Project but developed by UNICEF.

Evaluations of the micro-planning training workshops and demonstration projects by trainees clearly indicated that their knowledge base, skills and competencies related to planning processes, including collecting, managing, interpreting and using data, increased greatly through the training and demonstration projects. The computer training conducted through the demonstration projects has likewise resulted in the use of the computers supplied through the Project for data management and dissemination. Communication between the pilot districts and MoEST has also improved with the supply of fax machines to the six pilot districts.

The evaluation by participants of the Micro-Planning Project clearly showed that their professional capacities as planners and managers were positively impacted upon by the Project. The involvement of stakeholders and district assembly members in the DEP development processes was a key to producing DEPs, which were met with approval and support by those groups and subsequently at the national level. The DEPs are a bottom-up approach to planning, which now can be joined creatively with the national planning process to form a much more powerful national agenda for educational development that is in the firm control of Malawians.

Finally, it is worthwhile to point out that the reputation of the Project has spread beyond Malawi. The Government of Zambia has requested JICA representatives to brief them on the project components with a view to replicating it there. Outside of Africa, the experience of the Project in Malawi has influenced the production of training materials for a JICA supported project in Indonesia.

One last point relates to sustainability. The impacts discussed above are those that have occurred in the short-term. Longer-term impacts often represent sustained behavior change. It is expected that the Project's long-term impact will be sustained for a number of reasons. First, the Project has trained a competent team of core and national trainers who can continue the required training of regional, district and local level officers. Second, these trainers have

a kit of training materials developed through the Project that they can use for ongoing training on issues related to planning. Third, due to the active involvement of Malawians in all stages of the project, starting with its design, there is left behind a team of planners that is thoroughly familiar with all aspects of the programme and that can therefore spread and sustain its message in the next several years. Fourth, local level officers using locally available data that they were familiar with did the formulation of the DEPs. This improved both their understanding and internationalization of the process and eventual product to the extent that they should be confident and capable of implementing related future initiatives. Fifth, the involvement of relevant district level officers in both the training and approval of the DEPs should promote support of their implementation. Finally, MoEST and collaborating development partners have committed themselves to implementing the DEPs in the respective districts and to the development of a national education development strategy revolving around the policies and strategies listed the 33 DEPs, a move that will ensure use of the main Project outputs, namely, the District education plans.

6.2 Lessons Learned and Recommendations

6.2.1 General Organization of the Micro-Planning Component

1) Lessons Learned

Four main lessons can be drawn from the experience of organizing the Project's training program. Consultations on the various project activities were made a regular feature of the project through the Project's Technical and Steering Committees and the core trainer team. This linked the Project and the technical/professional wings of MoEST. A second lesson relates to the need for involving local professionals in the planning and implementation of project activities including the scheduling of events, the preparation of training materials, conduct of training and implementation of demonstration projects and their evaluation. Such counterpart involvement contributed to their support of the project's objectives and its acceptance by MoEST, to the quality and relevance of its outputs. Also helpful was the fact that the composition of the core counterpart team, one headquarter staff and two division planners, was key to the success of the Project. It improved understanding of the three levels of education management, namely, central, division and district. Third, having a clear structure and clearly spelt schedule of Project activities, which was very closely adhered to by all those involved in project implementation, did contribute significantly to superior time management and successful completion of relevant project activities. It also helped that roles of the various resource persons and MoEST officials were clearly spelt out. Finally, it needs to be

stressed that the formation of the Core Trainers and the Project Team were very effective to implement this Project smoothly and efficiently.

2) Recommendations:

- a) Recipient countries need to be involved in all stages of Project implementation, especially the design stage. Such involvement should be comprised of frequent consultative meetings around relevant advisory and implementing structures. Regular consultations minimize resistance to the goals of the Project and enhance implementation because of the sense of ownership that is promoted by this process.
- b) At the professional level, it is imperative to have a management structure around some kind of tripartite arrangement comprising the Project Team, the national team and the local donor representation. Such an arrangement contributes to promoting timely and focused accomplishment of project objectives.
- c) It is obligatory to have a clear Project timetable to which all those involved agree to adhere. Such a schedule should be unambiguous concerning the responsibilities of the parties involved. Relevant schedules and allocation of responsibilities may need revising based on the situation on the ground.
- d) The leadership qualities of Project Team Leaders should be ascertained before their appointment to these responsibilities. Whereas seniority and appropriate professional qualities are necessary conditions in a third world environment, other key traits to look for are ability to appreciate other peoples' cultures, humility, superior community relations skills, respect by colleagues not just management and hard work.

6.2.2 Training Programs

(1) Training Organization

1) Lessons Learned

Six main lessons emerge out of the training organization's experience. The first relates to the deep involvement of Malawian counterparts in decision-making associated with all aspects of the training program. Significant is the sense of ownership of the project among Malawians that was promoted through this approach. A second lesson relates to the use of The Malawi Institute of Management (MIM), a central and well-equipped venue close to MoEST and the Project's office as the training venue. The use of this well-resourced facility meant that resources could be commandeered more easily from both the MoEST and the Project office. Third, the combination of theory and practice (learn-by-doing) approach proved quite beneficial because trainees had more time to reflect on what they had learned before using it during the writing of the DEPs. Fourth, adequate preparations were made in advance for all the programs'

training workshops, including that for the demonstration projects. Fifth, the use of a cascading mode of training proved effective in reaching a much larger number of MoEST staff than would have been possible with an institutionalized approach. Finally, it was recognized that the training workshops could have done with more time. Although, it was possible for all the districts to complete writing their DEPs in the ten days available for the training, there was a lot that was rushed. As a result, some gaps in the draft DEPs were only completed after the completion of the training workshops.

2) Recommendations

- a) A strong counterpart team that is identified on the basis of their capability and interest in the project at hand needs to be involved in all aspects of the implementation of any given development project.
- b) Depending on the availability of the necessary workshop resources, training workshops should be held in central locations in the case of projects with a national coverage and divisional or district headquarters for divisional and district level ones, respectively.
- c) To the extent possible, an authentic learn-by-doing approach should be used in training programs that bring together an experienced and mixed group of participants.
- d) Planning for training workshops should be done in advance and those to be part of the training need to rehearse their expected contributions in time to be able to make any necessary adjustments.
- e) Depending on the level of available resources, at least four weeks of micro-planning training would be required to do a good job of DEP development and training in the use of computers for data analysis, storage and use. However, because a continuous four weeks of training may be impractical for a variety of reasons, it may be a good idea to have split sessions of two weeks apiece.

(2) Training of Trainers

1) Lessons Learned

The project relied very heavily on Malawi trainers who were selected after much consultation with MoEST on the basis of their qualifications for this project. Second, the extensive use of Malawi personnel in all aspects of the training program strengthened the sense of ownership of the Project among the Malawi counterparts who were the key presenters in plenary sessions and leaders of the discussion groups. Third, during the training sessions, Malawian trainers were well placed to respond to queries from the trainees in an informed manner. The working relationship between the locals and international experts was further

strengthened by the many opportunities for informal get-togethers that the project made possible.

2) Recommendations

- a) Selection of local counterparts should be done with the maximum level of rigor and in consultation with the recipient governments to ensure that the most competent locals are deeply involved in such projects.
- b) MoEST and partner organizations should strive for mixed teams of international and local experts as a way of ensuring relevance and effectiveness of project implementation.
- c) It is important to pay careful attention to the issue of allocation of roles between local counterparts and international experts to ensure an optimum working relationship. Modalities on the points of intervention by international experts should also be clarified well in advance and revised on the basis of need.
- d) Opportunities for socializing with local counterparts help to reduce the possibility of mistrust between the two parties, which is often the cause of the failure of many a development project.
- e) Depending on the target population, a combination of an institutionalized and cascade models should be used for training programs of this nature.

(3) The Training of District Level Officers

1) Lessons Learned

Limiting trainees to those directly involved in district education activities enhanced the possibility that the contents of DEPs would reflect local contexts and promote a heightened sense of ownership of the DEPs. However, the pairing of DEMs with officers from planning departments of the District Assemblies (DAs) proved valuable when it came to prioritizing needs and budgeting for the identified projects. The opportunity provided through the workshops for sharing knowledge between education personnel of varying qualifications and district planning officers, was helpful in breaking any possible barriers of communication between the district education managers and junior officers on the one hand and between education officers and officials from the district assemblies on the other. Finally, a lesson could be drawn from the experience of having trainees with different qualifications for the micro-planning workshops for the pilot and non-pilot districts. Whereas, trainees of the pilot districts included primary and secondary school heads, those of the pilot districts did not. There strong and weak points in both cases. The training process for the non-pilot districts may have gone faster; however, it lacked the diversity of opinion of the pilot district workshops.

2) Recommendations

- a) Where there is some leeway in deciding on potential trainees, the selection process should be done carefully to ensure that those selected are equal to the task. However, where a combination of candidates with varying backgrounds is inevitable, the selection process should be done in such a way that those selected can compliment one another's strengths.
- b) Training programs of this nature should use participatory approaches to the extent possible, as this is one way of ensuring that individual competencies are not sacrificed, as is often the case with methods dominated by the lecture method.
- c) If resources are available, a diversified group of trainees should be invited to training programs of this nature as the different experiences add much to the quality of both the process and outputs of training programs.

6.2.3 Training Materials

(1) Micro-Planning Training Manuals

1) Lessons Learned

The Project developed a 3-unit Micro-Planning Training Manual, which provides step-by-step procedures on how to develop the District Education Plan. It also contains the background information on micro-planning in Malawi context and the use of data for decision-making. During the Project, the manual was proven to be effective as a simple, practical and user-friendly planning tool for education officers even with little experience in planning. The manual was developed through a close collaboration with the local counterparts and experts, whose valuable comments made it relevant for training in the Malawi context. Field-testing was another essential part of developing the manual. The manual went through 4 (four) iterations of field-testing with some improvement made after each training. Thus, the final version is said to be well tested and in its final format.

2) Recommendations

- a) For the manual to be further utilized effectively, it is important for the Planning Unit of MoEST to take full responsibility in upgrading and utilizing it as an essential part of the micro-planning training program or as a planning guide on its own. It is also recommended that more copies be provided to each district so that PEAs and other stakeholders can improve their understanding of the planning process and take a more active role in updating and renewing their DEPs.
- b) Although the Manual was tailor made to fit the context of Malawi, the training program and the manual could be applied to other countries with

some modification.

- c) For the development of any materials it is essential to have inputs from local counterparts and experts, who are familiar with the target's experiences and level of understanding. Moreover, field-testing, if possible, should also be done before finalizing the material.

(2) Strengthening of School Census and EMIS

1) Lessons Learned:

Availability of reliable data is a prerequisite to planning at every level. It was found that the existing MoEST EMIS database was in many instances incomplete and in error to be used with needed confidence, which caused a serious problem for the training program. As existing EMIS does not generate most of educational indicators (pupil teacher ratio, pupil textbook ratio, pupil classroom ratio, etc.) it was necessary for the Project to prepare some basic indicators prior to the training. It was found that EMIS did not include all the necessary data for the calculation of even very important indicators such as drop-out and repetition rates. Further, the calculation of net enrolment rate (NER) was not straight forward as the school going age population was not included in population census data from NSO¹. Lack of an effective record keeping system at the school level was another problem contributing to the weakness of EMIS. Participants of the micro-planning training, who were often involved in data keeping and collection but rarely in decision making, recognized the importance of reliable data for planning. Once they understood how data might be used and why they needed to be accurate, their attitude to record keeping and data collection and management changed significantly. As chosen topics for demonstration projects, record keeping at school level and collection and management of data at zone/district level were recognized an essential to improving the quality of additional data, which is the basic material of planning.

2) Recommendations:

- a) In order to improve accuracy and reliability of data, a practical and uniform record keeping system should be introduced at the school level with clear guidelines. It is essential to train a number of key personnel in each school such as school heads, their deputies and section heads, so that they in turn can train and influence the other teachers. Such training should also include aspects of how to collect, store, manage and use data at the school level as well as why accurate data is important to schools.
- b) Though it is important to strengthen EMIS at all levels, accurate and

¹ Primary school going age is 6 to 13 in Malawi while NSO uses the age ranges: less than 1; 1-4; 5-9; 10-14; etc.

up-to-date data management at the school, zone/cluster and district levels should be given priority in the context of micro-planning. As the Project implemented training as one of the demonstration projects, capacity building in school census and EMIS at the school, zonal and district levels should be included in a possible next phase of the Project.

6.2.4 Preparation of District Education Plans (DEPs)

1) Lessons Learned:

The first lesson relates to the methods used in gathering data and the format of the DEPs. The concept of stakeholder consultations and feedback meetings worked extremely well, giving the key district people a sense of grassroots participation in the formulation of the DEPs. This supports sustainability for those district development activities identified in the DEP because of the sense of ownership that results from such a consultative approach. The consultative method may further promote broad based support with regard to DEP implementation as well as its monitoring and evaluation. Second, use of data at every stage of DEP preparation, enabled district level officers to better appreciate its value as the basis for informed decision-making. In the process of using different sets of data for plan development, trainees learned to appreciate some of the strengths and weaknesses of the available data as well as which data sets are more suited for which areas of policy development.

Informed use of data and local consultations further enabled trainees to be better placed to identify areas of priority attention in their respective districts as well as within districts and to identify solutions unique to the respective localities. The experience of localizing the development of DEPs brought to the fore the reality that the targets set by the *PIF* may not apply to some localities and that there may be need for reviewing these targets. Trainees were also better placed to come to terms with the fact that a plan is as good as the resources available for implementing it and that it is therefore necessary to prioritize planned activities in the face of limited resources.

Finally, the whole process of plan development did much to demystify the notion of a plan as something only central personnel, highly learned persons and representatives of international development partners are capable of writing and that this process requires lots of time. District and divisional level officers who went through the process of DEP preparation are also in a better position to plan for their own districts in the case of DEMs, zones in the case of Primary Education Advisors (PEAs) and schools in the case of head teachers. And as revealed by the workshop evaluations, they are also likely to be more confident in guiding their staff; are better placed to train and advise those not as

knowledgeable; can better plan for their districts; and are better equipped to implement and evaluate district, zonal and school level education programs.

2) Recommendations:

- a) Widespread consultations with all education stakeholders need to be an integral element of any process of developing and implementing educational policies and plans to ensure their successful implementation and sustainability.
- b) A common approach to training from the point of view of methodology and content, is likely to be more effective in promoting a common approach to dealing with educational problems which are more or less similar for most districts of Malawi and for identifying strategies of addressing them.
- c) Given that availability of accurate and reliable data improves the acceptability of education plans, MoEST should strive to promote a system of collecting reliable and accurate data, which originates from the school and district levels.
- d) In addition to emphasizing the value of having planned activities be guided by available resources, it is important to open trainees to other avenues for soliciting supportive resources as well as on mechanisms for harnessing such support.
- e) To ensure that the wealth of planning data contained in the DEPs is not lost, MoEST and international development partners need to invest in supportive follow-up actions. Thus, possible future collaborative projects need to incorporate a component on DEP implementation focusing on the training of relevant officers to market the DEPs, to fund-raise for the programs identified by them, to evaluate and monitor them as needed and to update them accordingly.

6.2.5 Social Campaigning

1) Lessons Learned

Social campaigning is the means by which those beyond the stakeholders who are specifically involved in a project are given information about new behaviors they need to practice. Under the decentralization movement, every person in the nation has an opportunity to interact with the educational system in a new way. The project focused on certain stakeholders who align with the intended project outputs. However, there is a much larger group of beneficiaries for which the project needs to inform, educate and communicate (IEC). By implementing a social campaign or IEC program, it is likely that a greater number of stakeholders will involve themselves improving education in new ways. This should be an intended project impact. To increase the level of success, the Project Team did conduct some IEC activities. A concerted effort was made to

involve other donors in formal meetings and informal visits to each other's offices. Information was shared so that an attempt was made not to duplicate efforts. Second, as part of development of district education plans, the six pilot districts were given forms and specific instructions to meet with stakeholder groups before and after training. The purpose of these meetings was to gain information from stakeholders about educational problems in the districts and then to disseminate information about the plans that were developed so that final changes could be made. Third, government officials not directly involved in the project were invited to a number of workshops and meetings held in Lilongwe and in district capitals. Fourth, the INSET demonstration project invited community members to a training session to be part of decision making for school management. Little else was done directly by the Project Team to implement either a top-down or bottom-up IEC program. This was beyond the scope of the project.

2) Recommendations

- a) It should be considered by JICA or other development partners including in its project design a mechanism for the project implementing team to include IEC in its implementation plan. The guidelines should explain that bidders should discuss; how they will conduct IEC activities targeted at different levels of the system; who will be the targeted stakeholders at these levels; and the methods expected that will be used; and impacts expected with IEC as part of the project.
- b) If an impact analysis is conducted by MoEST and JICA for this project sometime in the future, they may wish to consider including a workshop on how the different levels of government can include IEC as a technique to improve participation by stakeholders in improving education in schools and at the district level.
- c) MoEST and development partners should consider funding research on the topic of IEC and have its findings presented to all social sector groups. The contracted researcher will be responsible for recommending how IEC should be involved in future projects to improve impact and sustainability of outcomes.
- d) In their inception reports, project teams should identify target audiences, define messages that each audience is to receive, and ensure the broadest use of media including public meetings at community through national level, news releases, posters and billboards, radio and TV, and surveys.

6.2.6 Demonstration Projects

1) Lessons Learned

Although the EMIS and INSET demonstration projects were essentially skills transfer training projects whose intended outcomes were related to using various tools to increase the effectiveness of education delivery, one should not lose sight of the fact that quality improvement was the underlying intended outcome. Quality outcomes are, therefore, related to improving essential processes such as good communication leading to problem identification, planning, and problem solving. It is possible to focus investments on critical inputs such as attendance registers, data summary sheets, computers and other tools; provide essential training to key personnel who can train appropriate stakeholders; and set intended outcomes that foster essential linkages horizontally and vertically across the educational system. The demonstration projects can serve as simple models that use limited resources efficiently to improve the quality of education. Implied in the above statement is the need to provide appropriate tools. If a project is to be sustained, provision for an on-going supply of tools is necessary. It was surprising to see the extremely important role registration books played in both EMIS and INSET. These are multipurpose books that, when used properly, provide a variety of information about students. The projects demonstrated that such a tool is essential for improving community relationships; reducing absenteeism and dropout rates; establishing standardized procedures in schools; making school transfers easier and reliable, and for many other applications. One reason the demonstration projects were seen as successful is that appropriate skills training was provided to those responsible for implementing the demonstrations. There was a unanimous expression of support for the learning-by-doing approach where actual products were completed by schools in a group setting.

The computer is an essential tool for processing data that comes from the schools through the zones and clusters. The Project has demonstrated that multipurpose training can lead to multiple uses of the computer so that district offices can increase efficiency as well as use computer outputs for reports, accounting and simple correspondence. It is necessary to make conjecture as to outcomes because the timeframe of the demonstration and post demonstration surveys was too short. Further, the results were based primarily on focus group interviews, a technique that needs to be conducted by well trained surveyors. A more effective means of handling this would have been to extend the length of time for the pilots to allow attitudes and behaviors to be practiced and reinforced. Then, a balanced evaluation involving focus group surveys and observations should be conducted at least six months after the completion of the pilots.

2) Recommendations

- a) Combine the training for both EMIS and INSET, along with a more in-depth basic computer applications unit, to create a single training module that includes the community.
- b) Design an attendance register for secondary education and then develop a budget that puts registers in the hands of every teacher every year along with the training in how to use the registers effectively.
- c) Provide a budget to each district for the purchase of new computers every three years; for purchase of supplies and peripherals; for training; for maintenance; and for a dedicated phone line so that an email system can be instituted between MoEST and the districts. This would complete the linkages from school, to cluster/zones, districts, division and the national office.
- d) An impact analysis should be conducted before January 2003 to determine what tools, technologies and processes were still in use that are attributable to the demonstration projects. An appropriate methodology should be employed and surveyors trained again on proper implementation.

6.2.7 Project Monitoring and Evaluation

1) Lessons Learned

There are two levels of M&E that need to be considered – project implementation level and as a project output and impact on stakeholders within the project. In the case of the former, the Project Team used the mechanisms required by JICA that state that two progress reports and a final report be prepared and results reported to technical and steering committees in formal sessions and to JICA directly. This system has been tested over the years and needs little comment other than it is highly effective. The same is true for monitoring project outputs. The system, however, is weak when it comes to evaluation of project outcomes. Outcomes represent, for the most part, attitude and behavior changes that are sustained as a result of the project. The concept of sustainability suggests that the combination of inputs and processes used by the Project Team lead stakeholders to choose new ways of conducting themselves. In this project, the results were to lead stakeholders to implement district plans, collect more accurate data, involve community members in planning and decision making, and others. The question arises as to how one measures whether such outcomes have been sustained. Stakeholders have been observed practicing such behaviors during the project but what is to sustain these practices once the project team departs? How does MoEST or JICA know that stakeholders will continue these practices? At present, no system is in place to conduct such a sustainability or project impact analysis.

A similar problem arises at the stakeholder level. Each of the 33 district education plans contains an M&E component; however, only a limited amount of time was dedicated to covering M&E during the two week training sessions. For stakeholders to understand and conduct M&E activities, they need to practice them. Time did not permit such practicing. Although it is known that some of the 33 districts have submitted DEPs to their respective councils and that many have been approved, the Project Team will not be able to determine how districts will monitor and evaluate the implementation of the first year of each plan. Further, during the two pilots – INSET and EMIS – various skills training was provided related to computer use, accurate data collection, use of attendance registers, and community participation. Although all outputs were achieved, almost all on schedule, once again, the Project Team is not able to determine the outcomes or impacts of these pilots. The same shortcoming in project design exists meaning there is no system currently in place to conduct an impact or sustainability analysis.

2) Recommendations

- a) MoEST and development partners including JICA should consider redesigning the project M&E system emphasizing sustainability and prepare a standardized mechanism for conducting a sustainability analysis six months to one year after the project ends.
- b) Within a project, a training program should be implemented with stakeholders on how to conduct an M&E program with the output of such a program to be an M&E plan that will be implemented by counterparts.
- c) Incorporate results of such impact analyses in the design of new projects as well as disseminate results to registered consulting firms so they may learn about what works and what doesn't.

6.2.8 Partnerships with Other Projects and Programs

1) Lessons Learned:

The experience of working with other donors in Malawi has resulted in two main lessons for this Project. The first is that where donors had resources and inputs relevant to this Project, they were quite willing to share their experience with this Project. Thus the Project was able to benefit from some of the projects of other donors active in the Malawi education environment, among them DfID, USAID and DANIDA. However, their participation in this Project's activities, including briefing meetings of the Steering Committee to which they were invited was not active enough, perhaps due to the limited donor staffing in the field offices.

Second, it was learned that basing the launching of any project on the expected completion date for another partner's Project might not be a good idea. This is particularly the case where there are no guarantees or mechanisms for enforcing a specific schedule. Implementation of this Project was to commence after the completion of a joint DfID/CIDA/DANIDA School Mapping project, which was meant to provide the data needed by this Project. By the time this Project commenced, the school-mapping component had not started. As a result, this Project's Team had to improvise a mechanism for ensuring that it had the data it needed to commence its activities. The lesson here is that the implementation of any given project should not be tied to one supported by a donor with whom the Project in question has no written contract.

Third, donors are more likely to be interested in collaborating with projects that make their job easier and where government makes an effort to promote such cooperation. For example, donors investing in Malawian education are keen on using the DEPs to guide their investments in districts where they are active because they may find the job of needs prioritization already done for them. In a sense, the opportunity provided by the Project's Steering Committees for sharing information on the availability of the DEPs contributed to generating interest in their use by MoEST and other development partners.

2) Recommendations:

- a) The leadership of any given project and of relevant ministries needs to promote shared ideas with the major educational partners as a way of identifying areas and means of possible collaboration. This would reduce possible duplication of efforts around limited resources.
- b) International development partners sponsoring projects should make efforts to participate in joint donor review meetings and to aggressively market their own agenda at these areas. Part of the marketing should involve an indication of how other partners could complement their own activities.

6.2.9 Administration and Finance

(1) Linkage between Planning and Financing

1) Lessons Learned:

At present planning is conducted without sufficient consideration of resource availability. Planning efforts in data generation and management, target setting and action plan preparation are not matched by a similar effort in the realistic costing and prioritization of activities in reference to projected resource availability. Activities are prioritized to achieve desired, medium-term education targets in access, equity and efficiency.

2) Recommendations:

- a) Priority education activities must be further prioritized in relation to the availability of capital and recurrent expenditure. In view of fund availability adjustments in initial planning is very likely required and priority activities may need to be implemented in phases over a longer period.

(2) Technical Competence and Interactions among Education and Budget Officers

1) Lessons Learned:

Most officers in DA secretariats were transferred from District Commissioner's Offices. They have very limited capacity in technical knowledge and skills required to carry out the new mandate of decentralized planning and management. The new mandate requires close communications and interactions among education and budget officers in the formulation of education plans, the costing of these plans, and the estimates of forthcoming funds from various sources. But their work is largely compartmentalized in their own areas.

2) Recommendations:

- a) The next phase of the micro-planning project should give high priority to raising district officers' capacity in the estimate of realistic costs, forecasting of available resources, and preparation of activity-based budgets.

(3) Devolution of Responsibilities and Authorities to DAs

1) Lessons Learned:

The devolution of selected education sub-sectors including primary education to the DAs is broadly stated in the Decentralization Act. The detail of responsibilities and authorities devolved to local government, and of steps and procedures available for DAs, school and local community to manage assigned responsibilities are still to be clarified. Responsibility cannot be carried out successfully without the provision of necessary authority, and detailed steps and procedures.

2) Recommendations:

- a) Responsibilities and authorities assigned to central and local offices should be clearly defined and made known to all concerned as soon as possible. MoEST is understood to be working on this issue in consultation with the Ministry of Finance (MoF), Department of Local Government (DLG), DAs and other stakeholders. If technical assistance is required, the next phase of the micro-planning project is suggested to include support to MoEST in

the clarification of functions.

(4) Devolution of Education Services to Local Authorities

Achievements – GoM commitment to decentralization and *MTEF* based budgeting; took actions to modify and introduce new measures; *PIF* for education and DEP preparation done

Issues – Synchronization of DEPs with other sector planning; DAs' limited capacity in planning and financial management, constraining plan implementation; need for coordination among aid agencies in primary education; too many studies and reviews led by aid agencies; program prioritization but no strategic prioritization

This note has briefly reviewed the recently introduced decentralization policy and *MTEF* as key instruments for development planning and implementation. Their implications for district-level budget planning in primary and secondary education are significant, as well as for related capacity building for officers both at the national and local levels to fully understand and be able to adopt the concept and approaches being introduced under decentralization and *MTEF*. Main implications for further knowledge and skills are summarized below.

(5) Integration and Cooperation

Decentralization and *MTEF* require horizontal and vertical relationships and cooperation among different sectors and levels of government, as well as integration of development policy, strategy, programs and financial resources. In fact, *MTEF* is the instrument aimed to bring together all the elements of policy, strategic and financial planning over a medium-term, and to have these planning activities to be conducted with the bottom-up participation of people.

Under the new direction of government, responsibilities of Department of District and Local Administration (DDLA), MoF and MoEST have to be clearly defined in setting priority activities and budget ceilings, disseminating the information, and reviewing/ adjusting/generating a final draft budget estimate before it goes to Parliament. In this context, relationships among these department and ministries, and between the central and local offices need to be clearly streamlined and understood by all offices concerned.

Further, at the local level, an education development plan has to be well prepared to be included in an integrated district development plan and to gain support of the district assembly. Another important integration is called for in recurrent and capital budget planning. To increase the feasibility and sustainability of investments, their implications for the incremental recurrent budget should also be analyzed and estimated.

(6) Forecasting and Incorporating Different Financial Resources

Discrepancies between approved and actual budget allocations have been an issue despite detailed efforts to prepare ABBs. There are several important reasons for this problem. First it is linked to some deficiencies in the revenue forecasting model and MoF has been attempting to improve the methodology. Two is related to the forecasting of off-budgets such as various funds generated from external aid agencies. In recent years, external support to basic education has increased. But, the flow of funds has been slow or unpredictable, due largely to the absorption capacity of implementing agencies. Another issue is that while GoM has introduced ABBs, costing and financing arrangements under externally assisted projects do not correspond to ABBs which makes it impossible to incorporate in budget planning.

Contribution of local communities to basic education, and the role of the private sector and cost-sharing with households especially in secondary education are being encouraged. The level of these contributions is on the rise, but there is an issue of how to project and include them in the budget process. This is an area where improvements are needed both at the central and local levels.

(7) ABB vs. Line Item Budget

Under MTEF district offices have begun to generate activity-based budgets so that they can monitor where priority activities are funded for implementation. ABBs also allow for budget adjustments when needed on the basis of strategic priorities. MoEST and other line ministries are to aggregate these ABBs and produce a consolidated ABB for each ministry. However, for the accounting purpose there have been instances where ABBs were converted to line item budget, which made activity-based adjustments and monitoring impossible.

In brief, there is a clear need for the enhancement of knowledge and skills of both central and local officers, in this respect, seminars and workshops have been organized for different groups of officers, such as for sector managers and planners and for finance and account officers. Considering the main goal of MTEF and decentralization (i.e., the integrated and bottom-up development approach), occasional joint sessions for sector managers/planners and finance/account officers at the local level, with participants from central offices such as MoEST, DDLA and MoF seem to bring about a high pay-off.

CHAPTER VII CONCLUSIONS AND RECOMMENDATIONS

The Micro-Planning Component of the National School Mapping and Micro-Planning Project in the Republic of Malawi (the Project) aimed at institutional strengthening of the central and local administration systems of the primary and the secondary education sub-sectors. The Project was expected to contribute to the promotion of the GoM decentralization policy through the supportive education programs identified in the Education: Policy and Investment Framework (PIF).

The objectives and coverage of the Project were quite a challenge for MoEST and JICA because both parties had limited experience in carrying out this type of development project focusing on capacity building of the central and local level education officials as well as education plan formulation revolving around a bottom-up approach. The Project's participatory development approach was organized as follows:

- (1) *With the government officials.* This revolved around effective communication and collaboration between the technical and professional personnel of MoEST and the Project Team in planning, implementing, monitoring and evaluating all Project activities;
- (2) *With the stakeholders.* The focus here was the promotion of stakeholder participation at all stages of District Education Plans' (DEPs) preparation with a view to improving stakeholder ownership of the Project as well as the sustainability of the benefits of the training program; and
- (3) *With the other international development partners.* The Project maintained a close link with other development partners by inviting them to the Project's Steering and Technical Committee meetings and to the micro-planning training workshops. The Project also promoted a spirit of information exchange with these partners.

As is shown in "Chapter VI: Evaluation and Recommendations", after almost 2 years of collaboration between MoEST and the Project Team, the Project produced some practical and effective accomplishments. The main outputs of this cooperation were: a well-trained micro-planning trainers' team consisting of MoEST planners and district level officers; micro-planning training program and manuals; and 33 draft DEPs prepared by district level officers. Furthermore, through the micro-planning training workshops and those of the demonstration projects, the Project contributed to improving the capacity of central, division, district and zone/cluster level education officials, from all the country's education districts to better appreciate the need to use data for planning and management and their role in planning education in the context of the government decentralization policy.

Despite the numerous efforts by MoEST and international development partners in addressing the key problems facing the Malawi education system, there are still some major challenges to be addressed if the education offered to Malawians is to be of

acceptable quality and relevance. A recent article in the *Nation*, one of the country's leading newspapers, illustrates this. On March 12, 2002, the *Nation*, carried the following message: *"Results disaster: Out of 61,856 candidates who sat for the MSCE examination, 5,0713 failed to make the grade, representing a pass rate of 18.01% 47,218 JCE candidates passed the exam out of 82,530, representing a 57.21% pass rate. The MSCE pass rate has been declining over the years with 33% registered in 1996, 28% in 1997, 16% in 1998, 13% in 1999 and 20% in 2000."* This Project has contributed to addressing this challenge by putting together a capable and committed team of education planning personnel at the central and the local levels. This team is prepared to be an active and positive driving force in the development of the education sector by using the skills learned through the Project in collaboration with national, regional and local stakeholder groups.

In order to support the sustainability of their growing willingness and leadership in education planning at the central and district level as well as to expand the capability and enthusiasm developed by the Project, the Project Team strongly recommends that MoEST take appropriate follow-up measures to ensure that the precious outputs of this Project have long-term sustainability. In this regard, MoEST may need to:

- (1) Review the DEPs prepared through the Project with a view to developing a national education strategy revolving around areas which are outside the mandate of the DEPs including: curriculum improvement; qualitative and quantitative development of teachers; textbook distribution; and an identification of the key national education policy priorities and the development projects that should enhance their implementation;
- (2) Continue to provide firm leadership related to the coordination of educational stakeholder groups and international development partners and to the marketing of the DEPs prepared through the Project. In this connection, it is also necessary for MoEST to ensure that a development budget is allocated to districts under the newly introduced decentralized system to support the implementation of the DEPs.
- (3) Secure the micro-planning training system established through the Project, such as a training team and a training kit and provide leadership related to the reviewing and updating of DEPs by district-level education officials on an annual rolling basis;
- (4) Implement demonstration projects in selected districts based on the strategies identified in the DEPs as this would contribute rather significantly to cultivating the ownership of the DEPs by district-level officers as they collaborate with international development partners in implementing their plans.

Finally, the Project Team wishes to express its appreciation for the excellent cooperation received from MoEST, division, district and local level officers and other stakeholders with whom it worked. In order to secure and extend the Project impact, the Project team greatly appreciates MoEST's strong leadership in promoting the development of education in Malawi.