

THE UNITED REPUBLIC OF TANZANIA

Ministry of Education and Culture

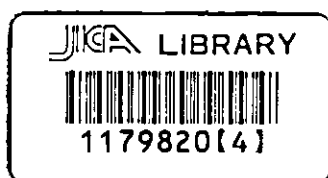
Japan International Cooperation Agency
(JICA)

President's Office-Regional Administration
and Local Government

**SCHOOL MAPPING AND MICRO-PLANNING
IN PRIMARY EDUCATION
(PHASE 2)**

FINAL REPORT

MAIN REPORT



JULY 2005

INTERNATIONAL DEVELOPMENT CENTER OF JAPAN

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(as of July 2005)**

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PREFACE

In response to a request from the Government of the United Republic of Tanzania, the Government of Japan decided to conduct a study on School Mapping and Micro-Planning in Primary Education and entrusted to the study to the Japan International Cooperation Agency (JICA).

JICA selected and dispatched a study team headed by Mr. Norimichi Toyomane of International Development Center of Japan between January, 2003 and June, 2005.

The team held discussions with the officials concerned of the Government of the United Republic of Tanzania and conducted field surveys at the study area. Upon returning to Japan, the team conducted further studies and prepared this final report.

I hope that this report will contribute to the promotion of this project and to the enhancement of friendly relationship between our two countries.

Finally, I wish to express my sincere appreciation to the officials concerned of the Government of the United Republic of Tanzania for their close cooperation extended to the study.

August 2005

Kazuhisa MATSUOKA
Deputy Vice President
Japan International Cooperation Agency

LETTER OF TRANSMITTAL

July 2005

Mr. Kazuhisa MATSUOKA
Deputy Vice President
Japan International Cooperation Agency
Tokyo, Japan

Dear Ms. Ogata:

I am pleased to submit to you the Final Report of the School Mapping and Micro-Planning in Primary Education (Phase 2) in the United Republic of Tanzania (SM/MP2). This study has been carried out by the International Development Center of Japan during the period between January 2003 and June 2005. This report summarizes the final results of the study in six parts: 1) Introduction; 2) School Mapping and Micro-Planning in Term 1; 3) School Mapping and Micro-Planning in Term 2; 4) Evaluation of School Mapping and Micro-Planning; 5) Education Management Information System (EMIS); and 6) Way Forward.

The study's main objective was to implement the school mapping and micro-planning exercise covering all primary schools in 32 Local Government Authorities (councils) of Tanzania. This exercise was also intended to expedite the implementation of the Primary Education Development Plan (PEDP) of Tanzania launched in 2001. In total more than 3,800 primary schools were covered by this study. Over 17,000 of council officials, ward officials and school committee members including head teachers received training and took part in the exercise. The exercise produced, among other things, sets of reliable school data, information-based and formatted school plans, and council education plans which consolidated individual schools' needs and aspirations.

In conducting the study, we, JICA Consultant Team, worked closely with the Ministry of Education and Culture and the President's Office Regional Administration and Local Government. We are grateful to them for their commitment to the study and dedicated cooperation in its implementation. Our appreciation also extends to the 32 Local Government Authorities, 811 wards, and over 3,800 primary schools which participated in this exercise and lead it to a successful completion.

It is our hope that this report will contribute to the school mapping and micro-planning exercise that is improved and sustained by the Tanzanian Government in the coming years. Finally, on behalf of the JICA Consultant Team, I would like to express my deepest gratitude to all the people who participated in this study for their great achievements.

Very truly yours,

Norimichi Toyomane
Team Leader, JICA Consultant Team for SM/MP2

SCHOOL MAPPING AND MICRO-PLANNING IN PRIMARY EDUCATION (Phase 2) IN THE UNITED REPUBLIC OF TANZANIA

Final Report

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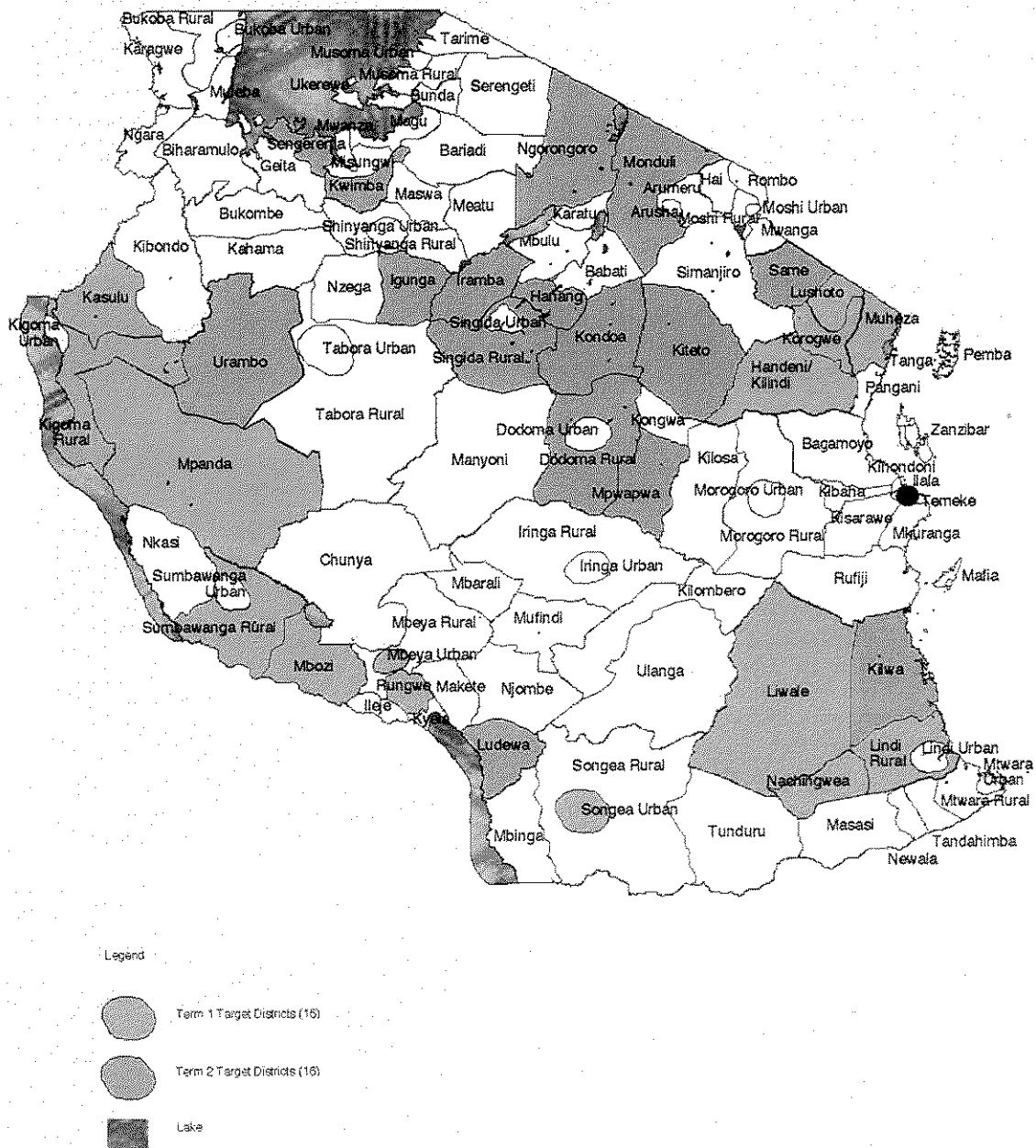
ABBREVIATIONS AND ACRONYMS

ADEM	: Agency for Development of Education Management
BEDC	: Basic Education Development Committee
BSE	: Basic Statistics in Education
CIDA	: Canadian International Development Agency
COBET	: Complementary Basic Education in Tanzania
CSD	: Civil Service Department
DAS	: District Administrative Secretary
DAP	: Department/Director of Administration and Personnel
DBSPE	: District –Based Support to Primary Education
DC	: District Commissioner / District Council
DED	: District Executive Director
DEO	: District Education Officer
DfiD	: Department for International Development
DPE	: Department of Primary Education
DPLO	: District Planning Officer
DPP	: Department/Director of Policy and Planning
DSA	: Daily Subsistence Allowance
DSLO	: District Statistics and Logistics Officer
DT	: District Treasurer
EMIS	: Education Management Information System
ESDP	: Education Sector Development Programme
EC/EU	: European Commission/European Union
EYSN	: Ernst & Young Shin Nihon Co. LTD
GER	: Gross Enrollment Ratio
GOT	: Government of the United Republic of Tanzania
HIPC	: Highly Indebted Poor Countries
HRDP	: Human Resource Development Project
IA-TWG	: Institutional Arrangements Technical Working Group
IDCJ	: International Development Center of Japan
JICA	: Japan International Cooperation Agency
KRI	: Koei Research Institute
LGA	: Local Government Authority
LGM&E	: Local Government Monitoring and Evaluation
LGRP	: Local Government Reform Programme
MC	: Municipal Council
MTEF	: Medium Term Expenditure Framework
MOEC	: Ministry of Education and Culture
MOH	: Ministry of Health
NBS	: National Bureau of Statistics
NECTA	: National Examination Council of Tanzania
NER	: Net Enrollment Ratio
NGO	: Non Governmental Organization
NORAD	: Norwegian Agency for Development Cooperation
NSHP	: National School Health Programme
O&OD	: Opportunities and Obstacles to Development
PEDP	: Primary Education Development Plan
PER	: Public Expenditure Review

PO-PP	: President's Office-Planning and Privatization
PO-PSM	: President's Office-Public Service Management
PO-RALG	: President's Office, Regional Administration and Local Government
PRSP	: Poverty Reduction Strategy Paper
PSLE	: Primary School Leaving Examination
SCOC	: Strengths, Challenges, Obstacles and Constraints
SED	: Social Economic Database
SEDP	: Secondary Education Development Plan
SM/MP1	: School Mapping and Micro-Planning in Primary Education (Phase 1)
SM/MP2	: School Mapping and Micro-Planning in Primary Education (Phase 2)
SWOT	: Strengths, Weaknesses, Opportunities and Threats (Analysis)
TC	: Town Council
TOT	: Training of Trainers
TRC	: Teachers Resources Centre
TSA	: Takwimu za Shule za Awali (Statistics of Pre-primary School)
TSD	: Teacher Service Department
TSED	: Tanzania Socio-Economic Database
Tsh.	: Tanzanian Shilling
TSM	: Takwimu za Shule za Msingi (Statistics of Primary School)
TSS	: Takwimu za Shule za Sekondari (Statistics of Secondary School)
TVU	: Takwimu za Vyuo vya Ualimu (Statistics of Teacher College)
UNICEF	: United Nations Children's Fund
UPE	: Universal Primary Education
VEO	: Village Executive Officer
WEC	: Ward Education Coordinator
WEO	: Ward Executive Officer

MAP

SCHOOL MAPPING AND MICRO-PLANNING IN PRIMARY EDUCATION (Phase 2) IN THE UNITED REPUBLIC OF TANZANIA



PHOTOS



Facilitator Training: Dr. Toyomane, the team leader of the JICA Consultant Team, is explaining how to operate School Mapping.



Facilitator Training: Participants are divided into groups and discussing School Planning process.

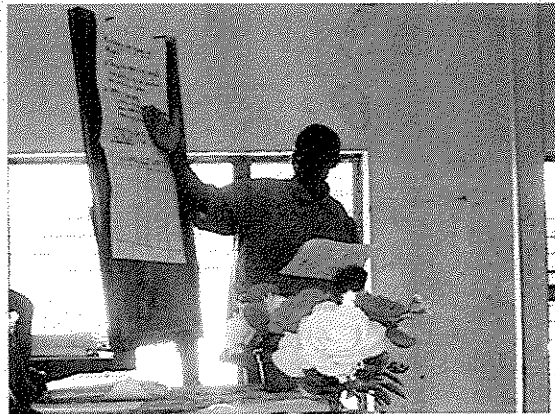


Facilitator Training: Mr. Liboy, Senior Education Officer of President Office, Regional Administration and Local Government (PO-RALG), is giving final remarks to the participants.

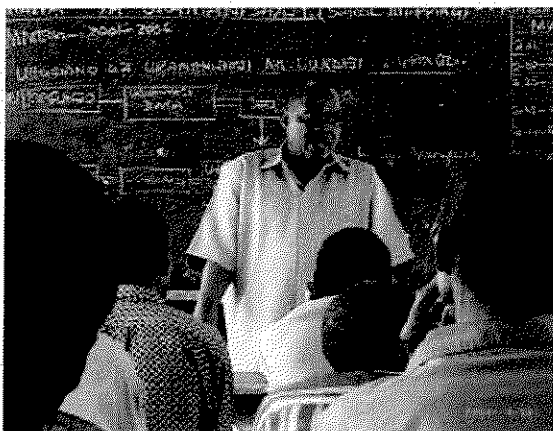
Sengerema Council-level Training: Mr. Miyedu, Senior Education Officer of MOEC, is giving a speech to the participants. (Right)



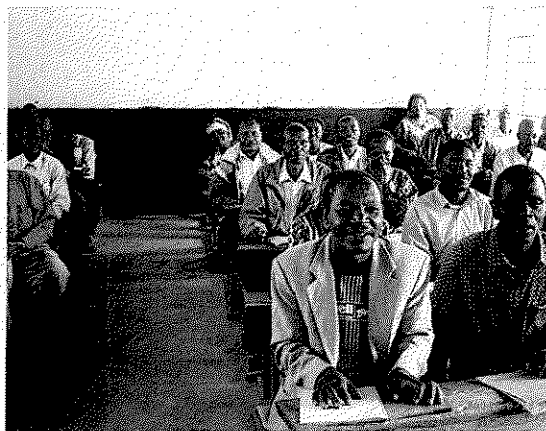
Monduli Council-level Training: The participants are writing up Plan of Operation in groups.



Urambo Council-level Training: a facilitator of ENV Consultant LTD is giving comments on an output of group work in a plenary session.



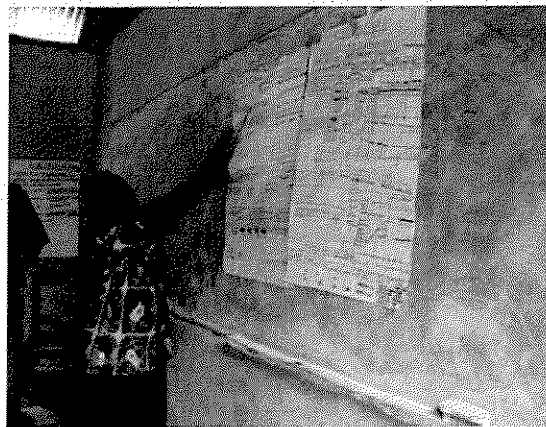
Ward-level Training at Kiomboi Ward in Iramba District Council: Mr. Magotta of PO-RALG is stressing the significance of School Mapping and Micro-planning in the context of the PEDP implementation.



Ward-level Training at Kiomboi Ward in Iramba District Council: The participants are attentively listening to the facilitator.



Ward-level Training at Buigiri Ward in Dodoma Rural District Council: The participants are actively discussing in a plenary session.



Ward-level Training at Hedaru Ward in Same District Council: A representative from a group is presenting the Annual Action Plan and Monitoring Plan after the group work.



Njoro Ward in Kiteto District Council: Mr. Lyanga of MOEC is greeting pupils at Mwanya Primary School



Data Consolidation at Dodoma Rural District Council: The JICA Consultant Team leader, Dr. Toyomane and district officials are checking printed data.



Muheza District Council: Mr. Gadnye of the JICA Consultant Team, is facilitating discussion among Ward Officers.



Seminar on SM/MP2 Results: Mr. Mwakalinga, Director of Policy and Planning of MOEC, is delivering an opening speech



The Participants were from various organizations such as District Councils, bi-lateral donors, NGOS, academic institutions and others (Left)



Seminar on SM/MP2 Results: Dr. Kuroda, the chairman of JICA Advisory Committee, is delivering a closing speech (Center)



Seminar on SM/MP2 Results: Ms. Musese, Acting Director of Institutional Development of PO-RALG, is delivering a closing speech.

EXECUTIVE SUMMARY

Introduction

The Tanzanian Government has been implementing a series of exercises since 1997 to train people on the skills of school mapping and micro-planning. JICA-assisted School Mapping and Micro-planning (SM/MP2) is among these exercises, jointly carried out from 2003 to 2005 by the team consists of officials of the Ministry of Education and Culture (MOEC) and President's Office - Regional Administration and Local Government (PO-RALG) and the JICA Consultant Team.

The exercise was implemented in a consistent manner with the ongoing initiatives of the Primary Education Development Plan (PEDP) and local government planning process. SM/MP2 is particularly complementary to education management aspect emphasized in the PEDP.

SM/MP2 has been contributing to improvement of capacity in data collection and consolidation and principally in planning at school, ward, and council levels. School Mapping is a basis of Micro-planning in the sense that School Mapping is a method for collecting data while Micro-planning is a process of planning based on analysis of present status at school, utilizing data processed from School Mapping.

Outline of SM/MP2

The objectives of SM/MP2 are to: i) complete school mapping and micro-planning in the 32 Local Government Authorities (LGAs); ii) strengthen capacity in local governments, which includes various level such as community, schools, ward and council through the school mapping and micro-planning process; and iii) develop a routine data collection framework on primary education.

SM/MP2 consisted of three mutually connected components of School Mapping, Micro-planning, and Education Management Information System (EMIS). School Mapping, and Micro-planning were closely interconnected, usually proceeding in sequence. EMIS was relatively independent but should collaborate with School Mapping particularly in designing appropriate questionnaires and data sheets.

32 target LGAs of SM/MP2 were divided into two groups. One group was dealt with in Term 1 (January-December 2003) and the other in Term 2 (January- December 2004). Term 1 covered 15 LGAs and Kilindi District Council (under formation) in Kigoma, Lindi, Mbeya, Ruvuma, Rukwa, and Tanga Regions while Term 2 covered 16 LGAs in Arusha, Dodoma, Iringa, Kilimanjaro, Manyara, Mwanza, Singida, Tabora and Lindi Regions.

School Mapping and Micro-Planning in Term 1 and Term 2

School Mapping and Micro-planning entailed a consecutive flow of activities. In School Mapping, the flow started from training at national, council, and ward level, then data

collection at school level, and finally data consolidation at council level. In Micro-planning, it also started from training at national, council, and ward level, then school planning, and finally council planning. For the training and reference purposes, the JICA Consultant Team prepared training materials including *School Mapping Handbook*, questionnaires, *School Planning Handbook*, and *Council Education Planning Handbook*.

Training both for the school mapping and micro-planning employed a cascade system. In the cascade system, training for school mapping and micro-planning launched from the national-level training. The national-level training involved the training of 16 Facilitators and council officers. MOEC, PO-RALG, and the JICA Consultant Team first trained them. After that, each facilitator and council officer went to his/her LGA in charge and trained other council education officers and ward officers including Ward Education Coordinators (WECs) and Ward Executive Officers (WEOs). At the ward level, ward officers trained head teachers, village leaders and school committee members under their charge. Finally, each head teacher together with the village leader and school committee member initiated the school mapping exercise. The same process was applied for the micro-planning training following the school mapping training.

A set of training sessions for School Mapping was separately operated from that of Micro-planning in Term 1 whereas they were joined together in Term 2 in order to strengthen the linkage between School Mapping and Micro-planning and save time of council officers to come up to Dar es Salaam where the national level training was held.

After the consecutive training sessions, head teachers of each target school administered data collection utilizing the questionnaires prepared by the JICA Consultant Team. Those collected data was compiled at ward level and then submitted to council level. Once data collection was completed, each target school proceeded to school planning. In parallel with school planning at each target school, education data submitted by school was consolidated at council level in computers. The councils then prepared council education plan taking into account school mapping data.

In Term 1, process of data consolidation took longer than planned and it was the main cause of delay of Term 1 completion. Term 2 however was able to complete almost as planned. It was possible since the JICA Consultant Team improved the Term 2 implementation methodology reflecting lessons from Term 1. The major improvement includes simplification of the questionnaires, pre-visit of target councils for pre-sensitization, combination of School Mapping and Micro-planning training, and adjustment of DSA rate into the Tanzanian Government standard.

Evaluation of School Mapping and Micro-planning

The JICA Consultant Team evaluated Term 1 councils from three folds: i) capacity building, ii) cascade system, and iii) social marketing.

In order to perceive effects on capacity building, the JICA Consultant Team decided to compare only school plans due to time constraints. Although number of sample plans may be too small to draw any definite conclusions, the JICA Consultant Team can safely

cite two generalizations: i) quality of school plans in non-SM/MP2 LGAs is generally low even though people received some form of training; and ii) school plans in non-SM/MP2 LGAs are not being implemented or used in day-to-day school administration.

In respect of cascade system, the JICA Consultant Team formed hypotheses, for which a 20-question test was specifically developed and administered on 71 people, of whom 62 received the training and 9 did not. The JICA Consultant Team concluded thorough analyses on the test results that the cascade system seems to work in Tanzania and identified three favorable conditions that make this possible. They are: i) well established administrative system; ii) Ward Education Coordinator's presence; and iii) Tanzanian people's human characters. When combined, the three conditions above created a conducive environment where the cascade system could work properly and achieve its goal. It should be noted, however, that this combination does not happen automatically. As SM/MP2 experience amply showed, what combines the three conditions is *the commitment of key officers at councils*. Simply, without their commitment, the cascade system could not work even in Tanzania.

In the light of social marketing, The JICA Consultant Team therefore retrospectively organized monitoring information to record the effects at least in a qualitative way. From the record the JICA Consultant Team can inductively conclude three lessons from the SM/MP2 experience in terms of social marketing effect: i) Micro-planning (school planning) is more effective than school mapping to induce social marketing effect; ii) Participatory school planning on a yearly basis will be the best means to achieve social marketing and, hence, improve education at the grassroots; and iii) Any other participatory programs or activities (e.g., O&OD) should also aim explicitly at social marketing as an objective.

Education Management Information System

The objective of one of SM/MP2 components, consolidation of EMIS, is to develop a routine data collection framework on primary education. In order to meet this objective, there were four stages: i) review of the existing education data collection systems; ii) analysis of potential data users' needs; iii) formulation of routine data collection framework; and iv) development and consolidation of the framework.

The most remarkable outcome of this component was consolidation of the *EMIS Development Plan 2004-2007*. JICA Consultant Team assisted the Tanzanian Government to finalize the draft EMIS Development Plan in December 2003, taking into full consideration of the analyses on existing system and data users' needs. After further discussion at the Institutional Arrangement Technical Working Group (IA-TWG), the draft Plan was then forwarded for approval of the Basic Education Development Committee (BEDC). On 21 April 2005, BEDC officially approved the *EMIS Development Plan 2004-2007* for implementation.

Way Forward

The school mapping and micro-planning exercise in Tanzania, which has evolved since 1997, completes its first-stage mission (to school map all LGAs on mainland) when SM/MP2 ends in May 2005. The exercise will enter the second stage where three new

goals should guide it.

Goal 1: Sustain the exercise as part of routine duty

The whole system should be rearranged so that the school mapping and micro-planning exercise could be sustained as a routine activity at the school, ward and council levels. The two-point essence of the reorganization is: i) separate school mapping from micro-planning; and ii) revise TSM1 and 2 to replace the school mapping part.

Goal 2: Give training on school planning to the remaining 27 LGAs

As the PEDP goes into its fourth year and experiences accumulate, it has increasingly become clear that *school planning* is the crucial element of the whole process, whether to better implement the PEDP or to improve school conditions. This is so because any good school management starts there and because school and community will interface there most effectively if guided properly. In view of this, it is highly regrettable that 27 LGAs have yet to receive formal training on the subject. The second stage should address this issue very seriously.

Goal 3: Promote school-based management combined with community participation

Admittedly, most of Tanzania's primary schools are faced with a myriad of difficulties that tend to negate the very notion of school-based management. Many are located in peripheries, denied adequate means of transportation or communications. They are commonly understaffed, poorly built, ill-equipped, and short of funds. At the same time, every school is held on the strong command line from the council. In reality they have little to "manage" at their own discretion. Nonetheless, the experiences show that schools could perform better with their own initiative and strong community support. Schools should be given authority to manage school affairs more independently with whatever resources they have.

PART 1 INTRODUCTION

1. BACKGROUND OF SM/MP2

1.1 School Mapping and Micro-planning

School Mapping is a method for collecting data on the school and education. In most cases, school mapping is a means to encourage people's participation in education and raise their awareness through the exercise. It was originated in France in the 1960s when they wanted to establish more secondary schools throughout the country. To do this, they had first to collect data from the regions on the locations of existing secondary schools, the expected number of new students and necessary teachers. The method developed specifically for this purpose was called "school mapping" because one main output was a map showing school locations. Since then, This method has been adopted in many countries as a means to collect very basic data from the schools and surrounding communities.

Micro-planning on the other hand is a process of planning at the local level. It focuses on the particular characteristics and needs of the local area. It is called "micro" in contrast to "macro-planning" that is done by the national government. Micro-planning was adopted in the decentralized system of Tanzania since it is naturally hinges heavily on the planning capacity both at the school and council levels.

The Tanzanian Government has been implementing a series of exercises since 1997 to train people on the skills of school mapping and micro-planning. JICA-assisted Phase 1 (SM/MP1) was one of these exercises, carried out from 1999 to 2001. It covered 33 Local Government Authorities (LGAs) throughout Tanzania, mainly training officers of the LGAs while collecting school mapping data from about 3,000 schools. As of the end of 2002, 82 LGAs¹ out of 114 were covered by the initiative, a large part of which was assisted by UNICEF, NORAD, CIDA and JICA².

1.2 Primary Education Development Plan (PEDP)

Since 1974, the Government of Tanzania has been committed to the provision of universal primary education (UPE). The Education Act No. 25 of 1978 stipulates that primary education be of seven years' duration and compulsory in enrollment and attendance. However, this goal was not fully attained in the past due mainly to the serious economic problems in the 1970s and 80s. As statistics show, from a peak of 98% in 1980, gross primary enrollment dropped to 71% in 1988, and gradually rose back to 84% in 2001. It then jumped up to 98.6% in 2002 and to 106.3% in 2004 as a result of response to the PEDP (Primary Education Development Plan) initiative launched in 2001. Accordingly, net enrollment also increased from 65.5% in 2001 to 80.7% in 2002 and further to 90.5% in 2004³.

¹ This report interchangeably uses the term, "council" and "LGA," as a meaning of municipal, town, and district councils.

² The numbers of districts assisted by the donors are: 44 by UNICEF (of which NORAD and CIDA financially assisted 18 and 13 districts, respectively), 33 by JICA SM/MP1. MOEC implemented school mapping and micro-planning in the remaining 6 districts.

³ Ministry of Education and Culture. 2004. Basic Statistics in Education 1995-2004: National Data.

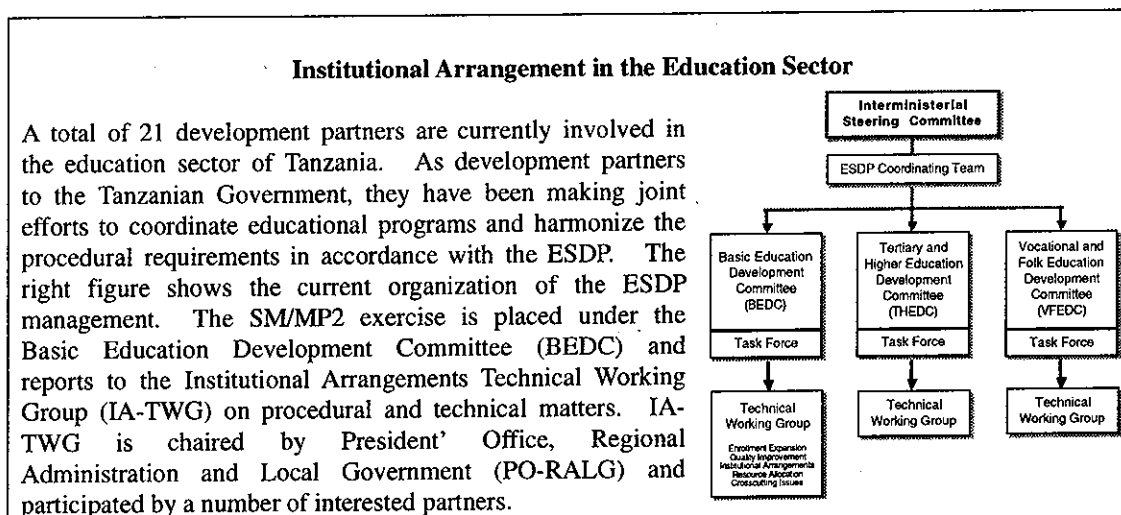
To improve the education sector, the Tanzanian Government developed the Education Sector Development Programme (ESDP) in 1999. It further elaborated the Primary Education Development Plan (PEDP) 2002-2006 in 2001, a five-year plan setting priorities and concrete targets and estimating budget requirements to achieve them. The main PEDP targets are improvement of education management, expansion of enrolment, and improvement of teaching and learning process. One of PEDP components is capacity building where the emphasis is on the acquisition of skills for whole school development planning, district education development planning, and national education planning. SM/MP2 particularly supports this part.

An innovative scheme of the PEDP is the two kinds of grants given to the schools: capitation grant and development grant. A capitation grant, calculated on a per capita basis, is for school supplies (including textbooks) and administrative costs. A development grant is to be spent on construction and rehabilitation work. Unlike the capitation grant, the development grant should be allocated according to the School Development Plan.

The PEDP is being implemented within a new decentralized system of educational administration. Since the late 1990s, the task of delivering primary education has been delegated to the LGA, in line with the decentralization policy. Under this new system, the LGA receives budget from the central government and then provides funds to individual schools. One crucial element of this new system is the requirement that each school prepare a three-year School Development Plan and a one-year Plan of Action and Budget to receive the development grant, a large portion of the funds available for the schools.

At the same time, the LGA is now required to formulate a Development Plan for schools within its jurisdiction, which is consistent with the School Development Plans. It is intended that in this way scarce financial resources be optimally allocated to meet the varying needs of individual schools.

Hence, the implementation of PEDP in the decentralized system strongly calls for the improved capacity of the people at the school and council levels concerning school mapping and micro-planning. That need was particularly urgent for the 32 LGAs which had so far not been covered by any exercise. This is so because the government requires that most schools should prepare both a "School Development Plan" and a "Plan of Action and Budget" and have them officially approved before receiving any development grant under the PEDP. It is in this context that the Ministry of Education and Culture (MOEC) has requested JICA to assist it with the on-going effort of school mapping and micro-planning in those remaining LGAs.



1.3 Planning in Local Governments

In the past few years, the Opportunities and Obstacles to Development (O&OD) process has been adopted by the Tanzanian Government as a means to operate a bottom-up planning process and harmonize central-local relations in planning and budgeting. Since the completion of pilot case of O&OD in Hai DC, Kilimanjaro Region in 2002-2003, PO-RALG has been extending the application of O&OD to the other LGAs.

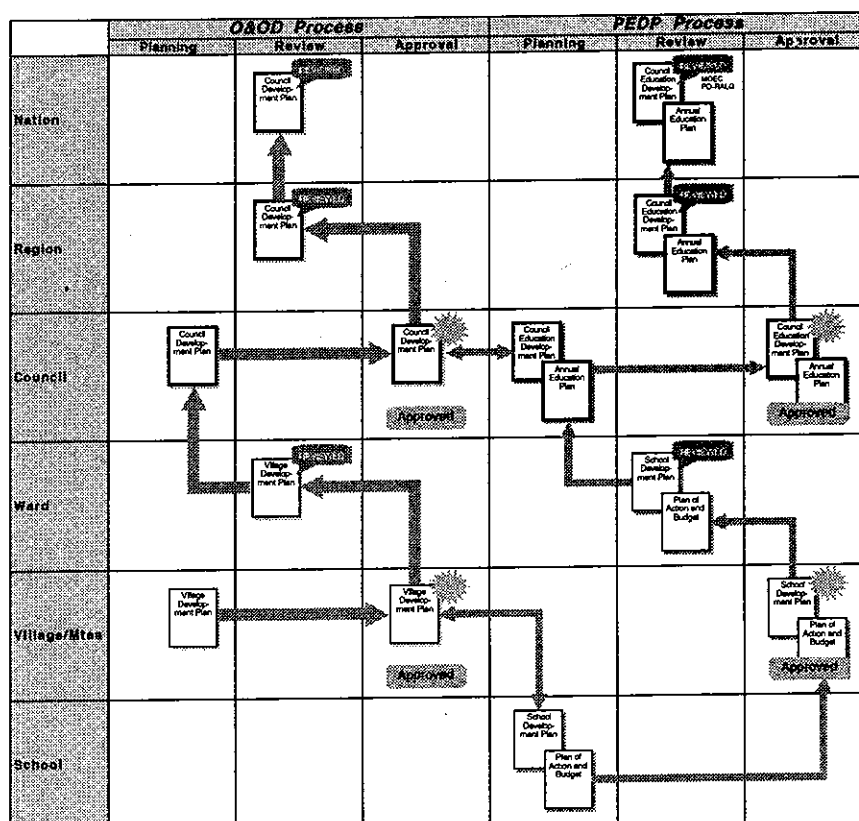


Figure 1.1 Linkage between O&OD Process and PEDP Process

As seen in Figure 1.1, the O&OD process starts at the community level (i.e., village) and aims to formulate a comprehensive plan for community development through

people's participation. The Village Development Plan will cover the education sector as its part and that part should guide educational development in the community. Each school is supposed to refer to this Plan when formulating its own School Development Plan to start the PEDP process.

The O&OD process and the PEDP process come to link once again at the council level when LGAs formulate its Development Plan based on the Village Development Plans. The Development Plan of LGAs contains an education plan, which will be fed into the PEDP process where the School Development Plans will also be integrated into the Council Education Development Plan.

Maintaining linkage with O&OD, SM/MP2 is systematically incorporated in the planning/budgeting procedure for primary education in Tanzania, starting from data collection and completing with monitoring. Figure 1.2 shows which parts of this whole procedure the SM/MP2 covers.

As is seen, the SM/MP2 primarily deals with data collection, planning and monitoring at the council and school levels. Since these activities are mostly new to the LGAs and schools, needs to build capacity are particularly significant with these processes.

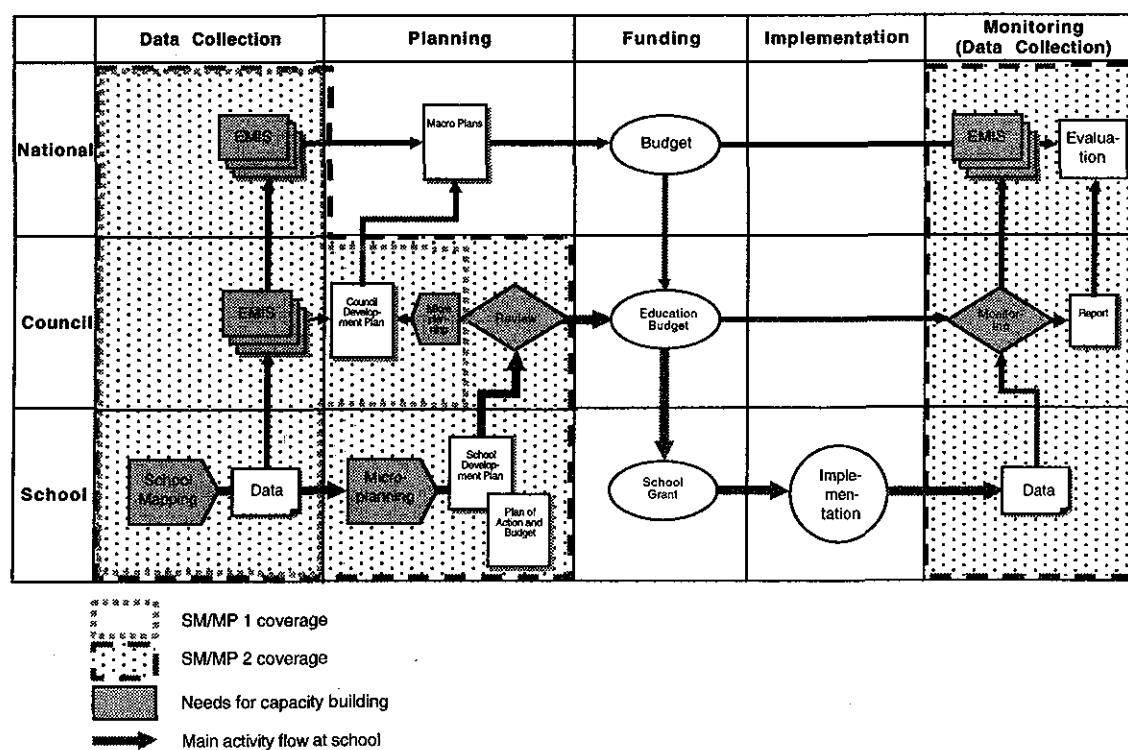


Figure 1.2 Planning and Budgeting System for Primary Education in Tanzania

2. OUTLINE OF SM/MP2

2.1 Objectives

The objectives of SM/MP2 are to:

- 1) Complete school mapping and micro-planning in the 32 LGAs;
- 2) Strengthen capacity in local governments, which includes various levels such as community, schools, ward and council through the school mapping and micro-planning process; and
- 3) Develop a routine data collection framework on primary education.

2.2 Component

To achieve the above objectives, the SM/MP2 is composed of three components:

Component A	School mapping
Component B	Micro-planning
Component C	Education Management Information System

As is easily seen, Components A and B are closely interconnected, usually proceeding in sequence. Component C is relatively independent but should collaborate with Component A particularly in designing appropriate questionnaires and data sheets.

2.3 Target Area

The SM/MP2 covers 32 LGAs in Tanzania Mainland. They are listed in Table 1.1 and shown on Map 1 above. The LGAs are divided into two groups. One group was dealt with in Term 1 (January-December 2003) and the other in Term 2 (January-December 2004).

Table 1.1 Target LGAs

Region	Target LGAs				
	1	2	3	4	5
	<i>Term 1 (16)</i>				
Kigoma	Kigoma DC	Kasulu DC			
Lindi	Lindi DC	Liwale DC	Nachingwea DC		
Mbeya	Mbeya MC	Mbozi DC	Rungwe DC		
Ruvuma	Songea TC				
Rukwa	Mpanda DC	Sumbawanga DC			
Tanga	Handeni DC	Kilindi DC*	Korogwe TC	Lushoto DC	Muheza DC
	<i>Term 2 (16)</i>				
Arusha	Monduli DC	Ngorongoro DC			
Dodoma	Kondoa DC	Dodoma DC	Mpwapwa DC		
Iringa	Ludewa DC				
Kilimanjaro	Same DC				
Manyara	Hanang DC	Kiteto DC			
Mwanza	Kwimba DC	Sengerema DC			
Singida	Iramba DC	Singida DC			
Tabora	Igunga DC	Urambo DC			
Lindi	Kilwa DC				

*Kilindi District Council is still under formation.

Coverage in the Target LGAs

SM/MP2 covered 32 LGAs in two years. All wards and public primary schools participated in the target LGAs. Main participants were: DEOs, council officers, WEOs, WECs, school head teachers and school committee members. The exact number of participants cannot be known but is estimated as over 17,000 for two years. Table 1.2 shows basic statistics about SM/MP2.

Table 1.2 Summary of Basic Statistics about SM/MP2

	Term 1	Term 2	Total
LGA	16	16	32
Ward	403	408	811
Primary School	1,904	1,920	3,824
Participants*			
Council officers	192	192	384
Ward officers	806	816	1624
School Committee members**	7,616	7,680	15,296

Note: * The numbers of participants are estimates only. They are calculated as:

Council officers 12 per LGA

Ward officers 2 per ward

School Committee members 4 per school

** School Committee members include head teachers.

2.4 Organizational Set-up

The Ministry of Education and Culture (MOEC) through its Department of Policy and Planning (DPP) is the responsible organization on the Tanzania side in the implementation of SM/MP2 while JICA on the Japanese side is responsible for assisting the Government of Tanzania (GOT) for the implementation through MOEC.

SM/MP2 was jointly carried out by the Tanzanian counterpart team and the JICA Consultant Team. Since SM/MP2 is part of PEDP, it is being implemented both by MOEC and PO-RALG. Therefore, Tanzanian counterpart team consists of officials from MOEC and PO-RALG. The JICA Consultant Team is composed of

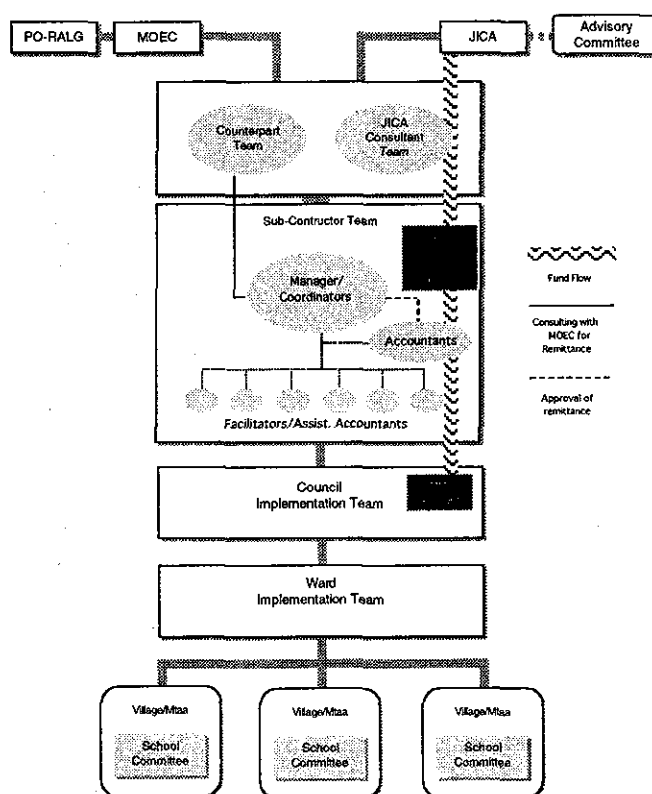


Figure 1.3 Organizational Structure for Phase 2 Implementation

consultants whose names and assigned tasks are described in the box below.

JICA Consultant Team

The International Development Center of Japan (IDCJ), the prime contractor to JICA for this exercise, carried out Phase 2. The consultant team formed by IDCJ is as listed in Table 13

Table 1.3 JICA Consultant Team Members

Name	Affiliation	Assignment
Dr. Norimichi Toyomane	IDCJ	Team Leader
Mr. Koji Sato	IDCJ	School Mapping 1
Mr. Paul Gandye	Independent	School Mapping 2
Ms. Masami Watanabe	KRI	Micro-planning 1
Mr. Yoshio Aizawa	IDCJ	Micro-planning 2
Mr. Ichiro Miyazawa	IDCJ	Educational Management Information System
Mr. Yoshio Chikamatsu	EYSN	
Mr. Tatsuya Nakai	IDCJ	Administration
Ms. Kai Utsugi		

KRI: Koei Research Institute / EYSN: Ernst & Young Shin Nihon

As shown in Figure 1.3, The JICA Consultant Team has been working with Sub-contractor Team, which consists of one coordinator, one accountant, 16 Facilitators, and 16 Assistant Accountants⁴. The Facilitators have worked in the target LGAs as trainers, advisors and monitors at various levels. At each target LGA and Ward, an Implementation Team has been formed to carry out this exercise, which aims to strengthening the implementation of PEDP.

2.5 Timeframe and Flow of Work

The SM/MP2 has been implemented for two and half years. The entire period is basically divided into three terms (Figure 1.4):

Term 1	School mapping and micro-planning in the first group of 16 LGAs [Jan 2003 - Dec 2003]
Term 2	School mapping and micro-planning in the second group of 16 LGAs [Jan 2004 – Dec 2004]
Evaluation	Post-evaluation of the Term-1 and Term-2 exercises [Jan 2005 - Jul 2005]

2003												2004												2005						
J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J
Term 1												Term 2												Evaluation						
School mapping and micro-planning in 16 LGAs												School mapping and micro-planning in 16 LGAs												Post-evaluation of Term-1 and Term-2 exercises						

Figure 1.4 Three Terms of SM/MP2

⁴ Assistant Accountants were hired from Term 2 implementation in order to strengthen fund management of the target LGAs.

3. STRUCTURE OF REPORT

This report is made up of six parts and twenty six chapters. Part 1, "Introduction", provides a background of the School Mapping and Micro-planning Phase 2 (SM/MP2) and goes on the outline of SM/MP2 as elaborated above.

Following Part 2, "School Mapping and Micro-planning in Term 1", gives details of the school mapping and micro-planning exercise in Term 1. It begins by time frame and flow of work and describes steps of cascade system. Prior to the activities, material development of *School Mapping Questionnaires*, *School Mapping Handbook*, *School Planning Handbook* and *Council Education Planning Handbook* is touched on. In Chapter 5, Box 2.1 shows comparison of other school planning handbooks and explains how *School Mapping Handbook* was developed.

For conducting the school mapping and micro-planning exercise, facilitation and training are indispensable parts, and the quality should be examined. Chapter 6 entitled "Facilitation and Training" describes contents of facilitator training, council-level training and ward-level training. Following this, Chapter 7 provides overviews of implementation of the school mapping, school planning and council education planning exercise. Chapter 8 and Chapter 9 review the process and output of the exercise. On the basis of facts and results in Term 1, Chapter 10 discusses about lessons learnt from Term 1 and shows a modified schedule and a plan for Term 2.

Part 3, "School Mapping and Micro-planning in Term 2" also gives details in the same manner as Part 2. In addition, Chapter 17 entitled "Lessons learnt from Term2" analyzes how the school mapping and micro-planning exercise is importantly meaningful for Tanzania, particularly for PEDP implementation. It also takes up an issue of sustainability of school mapping and micro-planning in Tanzania and examines how school mapping and micro-planning should be reorganized by reviewing of history of school mapping and micro-planning in Tanzania.

Part 4, "Evaluation of School Mapping and Micro-planning", brings issues of capacity building at council, ward and school levels (Chapter 19) and effectiveness of cascade system (Chapter 20). In Chapter 19 achievement of capacity building is evaluated primarily with respect to whether participants acquired the capacity as intended. Chapter 20 is closely linked to viewpoint of capacity building and of practical interest to the Tanzanian Government and development partners. Part 4 also discusses social marketing effect (Chapter 21) and benefits and shortcomings of PEDP (Chapter 22). In Chapter 21 social marketing effect is confined in the analysis to the difference in school committee's performance or community's involvement before and after the exercise.

SM/MP2 conducted as part of the PEDP process has led the JICA Consultant Team to observe and scrutinize the PEDP as being implemented at the very grassroots. Although it is beyond the prescribed task for the JICA Consultant Team to evaluate the PEDP itself, Chapter 22 gives a summary of what they observed in the field, which may be of some value to the Tanzanian Government and those concerned with the program.

Part 5, “Education Management Information System (EMIS)”, reviews the existing education data collection systems and analyzes potential data users’ needs. Based on these review and analysis, Chapter 23 formulates routine data collection framework and indicates development and consolidation of EMIS. Chapter 24 brings recommendation in terms of establishment of EMIS, access to data and human resource mobilization.

In Part 6, “Way Forward”, Chapter 25 says the school mapping and micro-planning exercise evolved since 1997 in Tanzania completed its first-stage mission (to school map all LGAs on mainland) when SM/MP2 ended in May 2005. Then, it points out that the exercise will enter the second stage where three new goals should guide it. There are some details explained the three new goals in Chapter 25.

PART 2 SCHOOL MAPPING AND MICRO-PLANNING IN TERM 1

4. OUTLINE OF TERM 1

4.1 Target LGAs

Term 1 covered 16 LGAs⁵ in Kigoma, Lindi, Mbeya, Ruvuma, Rukwa, and Tanga Regions. Table 2.1 lists those targeted Local Government Authorities (LGAs) by region.

Table 2.1 Target LGAs in Term 1

Region	Target LGAs				
	1	2	3	4	5
Kigoma	Kigoma DC	Kasulu DC			
Lindi	Lindi DC	Liwale DC	Nachingwea DC		
Mbeya	Mbeya MC	Mbozi DC	Rungwe DC		
Ruvuma	Songea TC				
Rukwa	Mpanda DC	Sumbawanga DC			
Tanga	Handeni DC	Kilindi DC*	Korogwe TC	Lushoto DC	Muheza DC

*Kilindi District Council is still under formation.

4.2 Timeframe and Flow of Work

In accordance with the objectives of SM/MP2, Term 1 involved the activities in school mapping, micro-planning, and education management information system in addition to common activities for those three areas. Table 2.2 summarizes initially planned timeframe for Term 1 and the actual time period of each activity carried out.

Table 2.2 Term 1 Activities: Planned and Actual

Activities	Original Plan as of January 2003	Actual
Common Activities		
[Co1] Presentation of the Inception Report	January 2003	January 2003
[Co2] Inception Report Seminar (Sensitization Seminar for LGAs)	February 2003	March 2003
[Co3] Inception Report Seminar (for donors)	February 2003	January 2003
[Co4] Selection of Sub-contractor	February 2003	February 2003
[Co5] Sample review of the phase-1 exercise	February 2003	February 2003
[Co6] Developing a social marketing strategy	February 2003	Omitted ⁶
[Co7] Progress Report 1	March 2003	March 2003
[Co8] Interim Report 1 and its presentation	October 2003	December 2003
[Co8] Interim Report 1 (Review Report) and its presentation	-	January - February 2003

⁵ Kilindi District Council is still under formation. Strictly speaking it is not yet a formal LGA.

⁶ Development of a social marketing strategy was omitted since the team found in the course of the school mapping and micro-planning activities that it was not realistic within the limited resources for the Team to develop the strategy in parallel with the mainstream activities of the school mapping and micro-planning implementation. The team reached the conclusion that the process of developing a social marketing strategy should better be separated from the school mapping and micro-planning activities as it is not primarily included in the Scope of Work.

Activities		Original Plan as of January 2003	Actual
School Mapping Activities			
[A1]	Review and evaluation of existing school mapping methodologies	February 2003	February 2003
[A2]	Revision of a school mapping methodology	February 2003	February 2003
[A3]	Training and monitoring		
	(1) Inception Report Seminar for council officers (Sensitization Seminar) [Co2]	February 2003	March 2003
	(2) Training for facilitators (Facilitators Training)	March 2003	March 2003
	(3) Training for council and ward officers	May 2003	May - June 2003
	(4) Training for communities and schools	May - June 2003	May - June 2003
[A4]	Collection and tabulation of educational data (community and school levels) and monitoring	June - July 2003	June - July 2003
[A5]	Compilation of educational data at council / Preparation of a School Mapping Report (council level) [Co9]	July - October 2003	July - November 2003
[A6]	Post-evaluation of the school mapping practices and suggestion for improvement	November - December 2003	November - December 2003
Micro-Planning Activities			
[B1]	Review of the planning process and methodology for the Action and Budget Planning	February - March 2003	February - March 2003
[B2]	Review and evaluation of existing micro-planning methodologies	February - March 2003	February - March 2003
[B3]	Revision of a micro-planning methodology	May - June 2003	April - June 2003
[B4]	Training and monitoring		
	(1) Inception Report Seminar for council officers (Sensitization Seminar) [Co2]	February 2003	March 2003
	(2) Training for facilitators (Facilitators Training)	June 2003	June - July 2003
	(3) Training for council and ward officers	July 2003	July - September 2003
	(4) Training for communities and schools	July 2003	August - November 2003
[B5]	Micro-planning and reporting at the school and council levels [Co10] [Co11]	August - October 2003	September - December 2003
[B6]	Post-evaluation of the school mapping practices and suggestion for improvement	November - December 2003	November - December 2003
EMIS Activities			
[C1]	Review of the current system of data collection and management for primary education	February - March 2003	February - March 2003
[C2]	User analysis of the primary education data	May - June 2003	May 2003
[C3]	Proposal of a comprehensive EMIS framework and its guideline ⁷	January - February 2004	November 2003

⁷ The background of and details about EMIS are discussed in PART 5.

4.3 Cascade System Employed in Term 1

Training for the school mapping and micro-planning exercise employed a cascade system. Component A shows the cascade system of the school mapping training and Component B shows the cascade system of the micro-planning training in Figure 2.1.

The national-level training involved the training of 16 Facilitators from the sub-contractor team. MOEC, PO-RALG, and the JICA Consultant Team first trained them. After that, each Facilitator went to his/her LGA in charge and trained council education officers and ward officers including ward education coordinators (WECs) and ward executive officers (WEOs). At the ward level, ward officers trained head teachers, village leaders and school committee chairpersons under their charge. Finally, each head teacher together with the village leader and school committee chairperson initiated the school mapping exercise. The same process was applied for the micro-planning training following the school mapping training (see Figure 2.1).

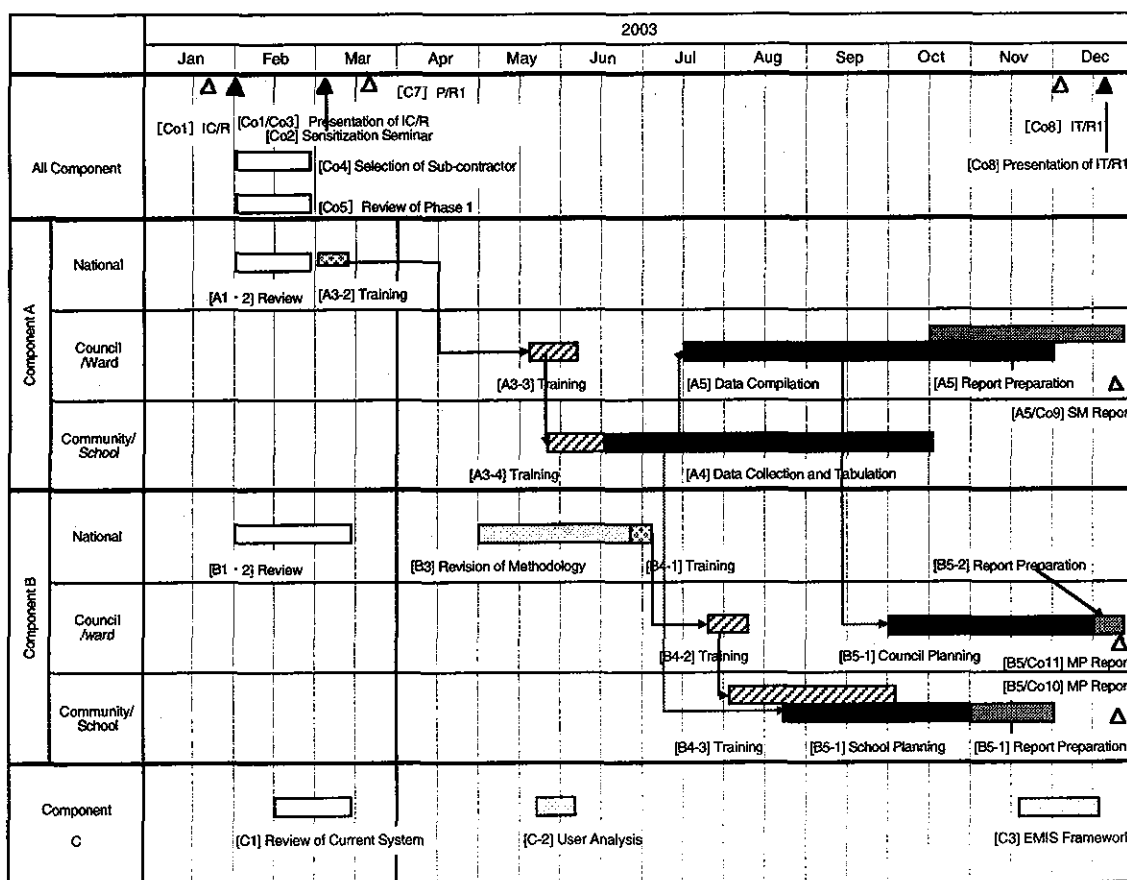


Figure 2.1 Operation of Term 1: Actual

5. MATERIAL DEVELOPMENT

Several materials were developed specifically for the purposes of the SM/MP2 exercise prior to Term 1 exercise. They are:

- 1) *School Mapping Questionnaires*
- 2) *School Mapping Handbook*
- 3) *School Planning Handbook*
- 4) *Council Education Planning Handbook*⁸

This section describes how they were developed. All materials were first drafted in English and then translated into *Kiswahili* (except *Council Education Planning Handbook*).⁹

5.1 School Mapping Questionnaires

Since school mapping started in Tanzania in 1997, questionnaires used for the purpose have evolved constantly through almost annual revisions. For the implementation of SM/MP2, the JICA Consultant Team reviewed two sets of questionnaires that were used in two preceding exercises: the UNICEF-assisted program and SM/MP1 supported by JICA.¹⁰ The review revealed that the UNICEF questionnaires were very comprehensive and detailed but too extensive and expensive to be sustainable and that the SM/MP1 questionnaires were relatively compact but contained some irrelevant questions¹¹ and unnecessary duplications with other statistical forms such as TSM1 and 2.

This observation led to four principles for designing SM/MP2 questionnaires:

- 1) Be simple, clear and compact;
- 2) Avoid duplications with other statistical forms or data sources;
- 3) Be relevant to the micro-planning exercise at school; and
- 4) Respect continuity with the past exercises.

The resultant questionnaires consist of five parts:

Part 1 About School

It consists of 22 questions about school *not* included in TSM1/2 or School Report.

⁸ The term, *Council Education Planning Handbook*, is used in the text instead of *District Education Planning Handbook* although *District Education Planning Handbook* was used in the actual process. This is because the term, "district" sometime does not include "municipal council" and "town council" which were among target LGAs of School Mapping and Micro-planning (Phase 2).

⁹ Council Education Planning Handbook was not translated because council officers are all fluent in English.

¹⁰ Other references include: *Wizara Ya Elimu Na Utamaduni. Takwimu za Shule za Msingi: Wanafunzi (TSM1)*. [Ministry of Education and Culture. *Primary schools' statistics: Students*]; *Wizara Ya Elimu Na Utamaduni. Takwimu za Shule za Msingi: Madarasa, walimu, majengo, vifaa na uzalishaji mali (TSM2)*. [Ministry of Education and Culture. *Primary schools' statistics: Classrooms, teachers, buildings, facility and income generation*]; *School Report format*; Ministry of Education and Culture. 2001. *School mapping guide for Tanzania* (particularly the list of minimum education indicators for use in school mapping, pages 22-24).

¹¹ Some questions about the economic conditions and status of the surrounding community did not seem directly related to school planning. Examples: percentage of households with electricity, percentage of households with telephone, percentage of households by occupation, availability of public health services, relation between marital type and educational awareness.

It includes questions such as numbers of textbooks and teacher's guides by standard and by subject, attendance rate of pupils and teachers, numbers of students who sat and passed PSLE, etc. Further it includes questions regarding access to clean water, common disease among pupils, HIV/AIDS and drug use.

Questionnaire Part 1: About Schools

- Q 1 How many textbooks does your school have?
- Q 2 How many Teacher's Guides does your school have?
- Q 3 Does your school have access to clean water (tap water or deep well)?
- Q 4 Does your school have a playground?
- Q 5 Does your school use the double shift to accommodate pupils?
- Q 6 How many periods do pupils take per week?
- Q 7 What is the average attendance rate for pupils?
- Q 8 What is the average attendance rate for teachers?
- Q 9 How many pupils took PSLE last year?
- Q 10 How many pupils passed PSLE last year?
- Q 11 How many pupils completed Std 7 last year?
- Q 12 How many pupils went on to public school at lower secondary level?
- Q 13 How many pupils in Std 5 to 7 are illiterate?
- Q 14 Why are they illiterate?
- Q 15 Count the number of the pupils according to their travel time from home to school.
- Q 16 If any pupils take more than 2 hours, why?
- Q 17 Count the number of the pupils according to their means of transportation.
- Q 18 What are the most common diseases among the pupils?
- Q 19 Is your school affected by HIV/AIDS?
- Q 20 If Yes, how?
- Q 21 Are drug issues serious in your school/area?
- Q 22 If Yes, how?

Part 2 About Teachers

It consists of 12 questions about teachers' view on teaching and the school and their working environment. Most of the questions here relate to quality of education such as teaching and learning process.

Questionnaire Part 2: About Teachers

- Q 1 Do you like teaching?
- Q 2 Do you like teaching at your school?
- Q 3 What do you like most about your school?
- Q 4 What do you dislike most about your school?
- Q 5 What is most necessary for you to teach better in your class?
- Q 6 What is most necessary for your pupils to learn better in your class?
- Q 7 What skills do you have to encourage pupils to learn better?
- Q 8 Why do you think many pupils do not pass PSLE?
- Q 9 Why is there a performance gap between boys and girls?
- Q 10 Do you think you have adequate knowledge and information about HIV/AIDS issues?
- Q 11 Did you have any chance to talk about HIV/AIDS issues with pupils?
- Q 12 If no, why?

Part 3 About Pupils

This part consists of 14 questions about pupils' view on learning and the school and their daily life including questions on subjects pupils like and dislike, teaching and learning process, corporal punishment, HIV/AIDS, meals.

Questionnaire Part 3: About Pupils

- Q 1 Do you like school?
- Q 2 If yes, why?
- Q 3 If no, why?
- Q 4 Which subject do you like most?
- Q 5 Which subject do you dislike most?
- Q 6 Do you want to go to secondary school?
- Q 7 Why do you think many pupils could not pass PSLE?
- Q 8 What will help you learn better?
- Q 9 Why do/did some of you stop coming to school?
- Q 10 Have you received any corporal punishment?
- Q 11 If yes, what kind of corporal punishment was it?
- Q 12 Do you know how to prevent HIV/AIDS?
- Q 13 Do you have breakfast every day before coming to school?
- Q 14 Do you have lunch every day?

Part 4 About Village/Mtaa

This part consists of 16 questions about the community around the school. It includes quantities information such as number of school age children, numbers of children attending primary schools and COBET schools, etc. and qualitative information such as reasons why children are not attending schools, assessment of teachers, opinion on pupils' performance in PSLE, opinion on HIV/AIDS, etc.

Questionnaire Part 4: About Village/Mtaa

- Q 1 What is the population composition of your village/mtaa?
- Q 2 How many children in your village/mtaa are attending primary school?
- Q 3 How many children in your village/mtaa are attending COBET school?
- Q 4 How many children in your village/mtaa are not attending any school?
- Q 5 What is the reason for children not attending any school?
- Q 6 Are you satisfied with teachers' performance?
- Q 7 If Yes, why do you think so?
- Q 8 If No, what do they need to do?
- Q 9 Do you think pupils' performance in PSLE is good?
- Q 10 If Yes, why can they perform well?
- Q 11 If No, why?
- Q 12 Do you think pupils need to get knowledge and information on HIV/AIDS prevention?
- Q 13 If No, why?
- Q 14 Do you have any chance or place to get information on HIV/AIDS prevention in your village?
- Q 15 Is HIV/AIDS recognized as a very urgent issue in your village?
- Q 16 If No, why?

Part 5 About School Committee

It consists of 7 questions about school committee activities such as planning, contribution to development work, etc. and school committee's views and opinions on school, HIV/AIDS, etc.

Questionnaire Part 5: About School Committee

- Q 1 How often does your school committee meet?
- Q 2 How much are your school committee members aware of the school situation such as access to clean water, corporal punishment, drop-out and HIV/AIDS?
- Q 3 To what extent do/did your school committee members participate in school development planning?
- Q 4 How frequently do your school committee members participate in school events?
- Q 5 How much are your school committee members concerned with students' achievement such as the result of PSLE?
- Q 6 Does your school committee support the school by raising funds, making in-kind contributions, providing advice or expertise, or organizing an education awareness campaign?
- Q 7 Does your community support the school by raising funds or making in-kind contributions?

5.2 School Mapping Handbook

Since any guidance to school mapping exercise is specific to the questionnaires to be used, the manual developed for School Mapping and Micro-planning in Phase 1 (SM/MP1) was completely revised. The handbook developed and used in SM/MP1 was comprehensive but found too theoretical for use at community and school level. The new version, *School Mapping Handbook*, is a straightforward, step-by-step guide for school mapping though it also provides basic concepts of school mapping and micro-planning and the relationship between O&OD and school mapping and micro-planning. The handbook was prepared for school committee members to administer school mapping using the above-mentioned questionnaires composed of five parts.¹² Care was taken to clearly explain how to fill in Part 2 (About Teachers) and Part 3 (About Pupils), two new experimental introductions that require special arrangement for data collection.

5.3 School Planning Handbook

With respect to school planning in Tanzania, a most relevant and notable reference is *Whole school development planning: A manual for primary schools in Tanzania* published in 1998 by the Ministry of Education and Culture.¹³ This manual was developed in the context of decentralization where it was felt necessary to train all the stakeholders on how to manage the school. The manual, however, appears largely for the head teacher's use, dealing with such specific subjects as school calendar, school curriculum, staff development, internal and external relationship, communication, and record keeping. Nonetheless, as far as school planning is concerned, the manual seems to provide a workable framework appropriate for Tanzania. The planning procedure indicated by the manual is: vision setting, stakeholder analysis, effective school analysis, SWOT or SCOC analysis,¹⁴ goal setting, and prioritizing. This same procedure was basically followed in the *School Planning Handbook* for SM/MP2.

Another significant reference we used was the manual for school management developed by the Agency for the Development of Education Management (ADEM)¹⁵ for the purpose of strengthening management capacity at the school level in accordance with PEDP. This manual deals with four main aspects of school management: administration; auditing; procurement and financial management; and school planning. The school planning section is rather sketchy, however, and it may require some supplemental materials or explanations for the trainees to obtain a better understanding of the subject. SM/MP2 developed its *School Planning Handbook* with this analysis in mind, making it complementary to the ADEM manual with a clear procedural framework, examples and suitable exercises.¹⁶ Box 2.1 indicates more details of the

¹² References used to develop this *Handbook* include: Ministry of Education and Culture. 2001. *School mapping guide for Tanzania*; Ministry of Education and Culture and JICA Study Team. 2001. *Manual for school mapping*.

¹³ Ministry of Education and Culture. 1998. *Whole school development planning: A manual for primary schools in Tanzania*. This manual was created by a group of Regional Academic Officers, District Academic Officers, District Chief Inspectors of Schools, Zonal Inspectors of Schools, ADEM (then MANTEP) Institute staff and MOEC staff. Irish Aid provided both financial and technical assistance.

¹⁴ SWOT (strengths, weaknesses, opportunities and threats) or SCOC (strengths, challenges, opportunities and constraints) analysis.

¹⁵ Agency for the Development of Education Management. 2003. *Uimarishaji wa uwezo wa wajumbe wa kamati za shule za msingi [Capacity building for the school committee members]*.

¹⁶ Two other references used extensively to develop the *Handbook* were: Ministry of Education, Science and

analysis of ADEM manuals.

Box 2.1 Comparison of Handbooks: ADEM School Committee Manual; ADEM Manual for Primary School Head Teachers; and SMMP2 School Planning Handbook			
	Participatory Planning in School Committee Members Guide	Planning Module used in the Training Course for Primary School Head Teachers at ADEM	SM/MP2 School Planning Handbook (prepared by JICA Consultant Team)
Table of Contents	1.0 Introduction 1.1 Participatory School Development Plan (pg 1) 1.2 Steps of Participatory Planning (1/2 pg) 1.2.1 Step 1: Situation Analysis (1/2 pg) 1.2.2 Stakeholders Discussion (1 pg) 1.2.3 Step 2: Setting Objectives (1 pg) 1.2.4 Step 3: Setting Priorities (1/3 pg) 1.2.5 Step 4: Drafting the Plan (1/3 pg) 1.2.6 Step 5: Approval of the Draft Plan (1/2 pg) 1.2.7 Step 6: Plan Implementation (1pg) 1.2.8 Step 7: Plan Monitoring (1/2 pg) 1.2.9 Step 8: Plan Evaluation (1/2 pg) 1.3 Main Steps of Planning - Summary of the above (3 pgs) - Budgeting (2 pgs) - Illustrations on Planning cycles (3 pgs) 1.4 Conclusion (1/4 pg) <i>NB: This is an A4 paper.</i>	Preface Acknowledgment Format of the Module How to use the Module Chapter One: School, Development and Plans (3 pgs) Chapter Two: Participatory School Development Plan (2 and 1/2 pgs) Chapter Three: School Stakeholders (2 1/2 pgs) Chapter Four: Steps in School Development Planning - Situation Analysis & SWOT analysis (1 1/2 pgs) - Setting Objectives (2 pgs) - Setting Priorities (1 1/2 pgs) - Drafting the Plan (2 pgs) - Plan implementation and Budgeting (4 1/2 pgs) - Monitoring and Evaluation (2/3 pgs) <i>NB: This is a small booklet with 5.5 x 8 paper size. (Size of a video cassette cover)</i>	SECTION 1: INTRODUCTION - The School Planning Workshop (1 pg) - What is going on around Education? (1 1/2 pgs) SECTION 2: PROCESS OF SCHOOL PLANNING - Main Steps of School Planning (2 pgs) Step 1. Stakeholders Analysis (2 pgs) Step 2. School Mapping Analysis (4 pgs) Step 3. SWOT Analysis(2 pgs) Step 4. Program Formulation (1/2 pg) 4-1 Setting Vision (1/2 pg) 4-2 Setting Objectives (1 pg) - tentative objectives list (1/2 pg) - financial resources identification (5 pgs) - prioritizing objectives (1/2 pg) 4-3 Setting Targets (1 1/2 pgs) 4-4 Setting Activities (1 1/2 pgs) 4-5 Identifying Required Resources and Calculating Cost (3 pgs) Step 5. Plan of Operation (2 pgs) Step 6. Annual Action Plan (2 pgs) Step 7. Monitoring Plan (2 pgs) SECTION 3: REPORTING (1/4 pg) Format of School Development Plan (1pg)
Target	School Committee Members	Primary School Head Teachers	All those involved in School Planning
Main Steps			
Situation Analysis	<ul style="list-style-type: none"> • Strengths, Weakness, Opportunities and Obstacles • Stakeholders discussion 	<ul style="list-style-type: none"> • Stakeholders Analysis • SWOT Analysis 	<ul style="list-style-type: none"> • Stakeholders Analysis • Analysis of School Mapping findings • SWOT analysis
Planning Formats Required	<ul style="list-style-type: none"> • Operation Plan • Annual Action Plan • Monitoring Plan 	<ul style="list-style-type: none"> • Operation Plan • Annual Action Plan • Monitoring Plan 	<ul style="list-style-type: none"> • Three-Year Plan of Operation • Annual Action Plan • Monitoring Plan

Technology, Republic of Malawi, and JICA. 2002. *Micro-planning training manual kit*; and Ministry of National Education, Republic of Indonesia, and JICA. 2002. *Modules 1-9: Kecamatan and school level*. Both manuals were developed specifically for training local government officers and school committee members on school planning. Both were field-tested extensively and proved very practical and usable.

Format Examples Provided	<ul style="list-style-type: none"> • Annual Action Plan • Evaluation Form 	<ul style="list-style-type: none"> • Combined Three year Plan of Operation, Annual Action Plan, Monitoring and Evaluation Plan 	<ul style="list-style-type: none"> • Three-Year Plan of Operation • Annual Action Plan • Monitoring Plan
Characteristics	<ul style="list-style-type: none"> • Participatory planning process • Step by step method • Budgeting 	<ul style="list-style-type: none"> • Participatory planning process • Step by step method • Budgeting 	<ul style="list-style-type: none"> • Participatory planning process • Step by step method using activities • Some examples for each step • Emphasis on serious resource identification • Emphasis on Budgeting and proper costing

Note: In both ADEM manuals there are no formats for:
a) Plan of Operation
b) Monitoring Plan
Also in School Committee Members Guide, the Annual Action Plan does not show:
a) Resources Required
b) Cost
c) Source of Funds
The planning format for Head Teachers training module seems to be a combination of Annual Action Plan, Plan of Operation and Monitoring/ Evaluation plan without Cost and Sources of funds.

5.4 Council Education Planning Handbook

The main reference for producing the *Council Education Planning Handbook* was the *Micro-Planning Handbook* made in SM/MP1.¹⁷ This handbook was designed for the council officers to use and therefore provided an appropriate reference for micro-planning at the council level. In developing the *Council Education Planning Handbook*, however, the planning procedure was simplified omitting the step of participatory problem analysis, which proved ineffective and burdensome to inexperienced facilitators or trainers in the cascade training system. Instead, the *Council Education Planning Handbook*, incorporated a section on how to analyze the data collected through school mapping and a very simple SWOT analysis. Care was taken to streamline this *Council Education Planning Handbook* to be consistent and in parallel with the *School Planning Handbook* to avoid confusion and give clarity.

¹⁷ Ministry of Education and Culture, United Republic of Tanzania, and JICA. 2001. *Micro-planning Handbook*.

6. FACILITATION AND TRAINING

Different levels of facilitation and training were organized throughout the school mapping and micro-planning activities as summarized in Table 2.3. Table 2.4 also shows estimated numbers of the participants in SM/MP2 by activity.

Table 2.3 Term 1 Seminar / Training

Seminar /Training Activities	Place	Time	Trainee	Facilitator (Trainer)	Monitor
Common					
Sensitization Seminar 1 day	Courtyard Hotel, Dar es Salaam	March 4, 2003	DEO* District Treasurer (DT)*	MOEC PO-RALG JICA C/T	--
School Mapping					
Facilitators Training 2 days	Courtyard Hotel, Dar es Salaam	March 5-6, 2003	DEOs, Sub-contractor Team, Facilitators	MOEC PO-RALG JICA C/T	--
Council-level Training 2 days	Each LGA	May - June 2003	Council officers (DEO*, DPLO*, DT*, DSLO*, etc.), WECs and WEOs	Facilitator	JICA C/T
School Training 2 days	Each Ward	May - June 2003	Head Teachers, VEOs, SC Chairpersons	WEC WEO	Council officers Facilitator JICA C/T
Micro-planning					
Facilitators Training 5 days	Courtyard Hotel, Dar es Salaam	June 30 - July 4, 2003	DEOs*, Sub-contractor Team, Facilitators	MOEC PO-RALG JICA C/T	--
Council-level Training 2-5 days	Each LGA	July - September 2003	Council officers (DEO*, DPLO*, DT*, DSLO*, etc.), WECs and WEOs	Facilitator DPLO	JICA C/T
School Training 5 days	Each Ward	August - November 2003	Head Teachers, VEOs, SC Chairpersons	WEC WEO	Council officers Facilitator JICA C/T

*This report uses the expression, District Executive Director (DED), District Education Officer (DEO), District Planning Officer (DPLO), District Treasurer (DT), District Statistics and Logistic Officer (DSLO), and District Academic Officer (DAO) as titles not only of district council officers but also of municipal and town council officers for convenience. For instance, "DEO" in this report stands for Municipal Education Officer, Town Education Officer, and District Education Officer, and "DPLO" stands for Municipal Planning Officer, Town Planning Officer, and District Planning Officer, and the same is applied for other expressions.

Table 2.4 Estimated Numbers of the Participants in SM/MP2 by Activity in Term 1

	School Mapping				Micro-Planning				Total *
	Council-level Training	Ward-level Training	Collection and Tabulation of Data	Compilation of Data	Council-level training	Ward-level Training	School Planning	Council Education Planning	
Term 1									
Council officers	192	-	-	192	192	-	-	192	768
Ward officers	822	822	822	822	822	822	822	822	6,576
School Committee members	-	7,616	7,616	-	-	7,616	7,616	-	30,464
Total	1,014	8,438	8,438	1,014	1,014	8,438	8,438	1,014	37,808

Training on school mapping took place at the national, council and ward levels in the

cascade system as mentioned *Section 4.3 Cascade System Employed in Term 1*. Following are some details of training at different levels.

6.1 Sensitization Seminar

A Sensitization Seminar was held on March 4, 2003, in Dar es Salaam. The purpose of the seminar was to familiarize the council officers with the concept of school mapping and micro-planning as well as SM/MP2 itself. In total 72 personnel participated in the seminar. The participants included MOEC officers, PO-RALG officers, District Education Officers (DEOs), District Treasurers (DTs), the Sub-contractor Team, JICA personnel, and JICA Consultant Team.

Proceedings

- | | |
|----------------------------|---|
| 1. Introduction Remarks | Department of Policy and Planning, MOEC |
| 2. Official Opening Speech | Director of Primary Education, MOEC |
| 3. Introduction of SM/MP2 | Department of Policy and Planning, MOEC |
| 4. SM/MP2 and PEDP process | PO-RALG |
| 5. Details of SM/MP2 | JICA Consultant Team |
| 6. SM/MP2 Financing | Department of Policy and Planning, MOEC |
| 7. Questions and Answers | Participants |
| 8. Closing Remarks | Department of Policy and Planning, MOEC |

6.2 Facilitators Training

Facilitators Training for School Mapping

Facilitators Training for the school mapping exercise was held on March 5-6, 2003, in Dar es Salaam. In total 45 personnel participated in the training. Participants included the Sub-contractor Team, MOEC, PO-RALG and JICA Consultant Team. Participants from the Sub-contractor Team included Facilitators, a manager, a coordinator, an accountant and backstopping members.

Proceedings

March 5, 2003 (Day 1)

- | | |
|---------------------------------------|---|
| 1. Opening Speech | Department of Policy and Planning, MOEC |
| 2. 1) JICA Phase 1 and Phase 2 | JICA Consultant Team |
| 2) Facilitator's Roles | - ditto - |
| 3) Approach and Timetable | - ditto - |
| 3. 1) Concept of school Mapping | - ditto - |
| 2) Draft School Mapping Questionnaire | - ditto - |
| 3) Comment and Discussion | Participants |
| 4. Discussion: Lessons from Phase 1 | - ditto - |

March 6, 2003 (Day 2)

- | | |
|---|----------------------|
| 1. School Mapping Handbook for School (Draft) | JICA Consultant Team |
| 2. How to Prepare for Term 1 Activities | - ditto - |
| 3. Closing Remarks | - ditto - |

Facilitators Training for Micro-planning

Facilitators Training for micro-planning exercise was held on June 30-July 4, 2003, in

Dar es Salaam. A total of 56 personnel participated in the training. Unlike Facilitators Training for school mapping, DEOs were also invited in addition to the Sub-contractor Team in order to make DEOs familiar with the planning method for efficient and effective delivery of Council-level training. Participants thus included DEOs, Sub-contractor Team, MOEC, PO-RALG and JICA Consultant Team. Participants from the Sub-contractor Team included Facilitators, a manager, a coordinator, an accountant and backstopping members as in the Facilitators Training for school mapping.

<u>Proceedings</u>	
June 30-July 2 (Day 1 - 3)	
1. Official opening of the training	Director of Policy and Planning, MOEC
2. Introduction	JICA Consultant Team
3. Training for council education planning	- ditto -
July 2-July3 (Day 3 - 4)	
4. Training for school planning	JICA Consultant Team
July 4 (Day 5)	
5. Findings from the school mapping exercise	Sub-contractor Team
6. Financial management procedures	- ditto -
7. School mapping data analysis using computer	- ditto -
8. The way forward	JICA Consultant Team
9. Closing remarks	Department of Policy and Planning, MOEC

This five-day training gave explanation on micro-planning methodology, instructed on how to conduct the exercise at the council and school levels and provided group work based on the steps taken for planning. During the group work participants took the position of council officers (for council-level training) and schoolteachers (for school training at the ward level) and went through the steps of planning activities as per the micro-planning handbook. After each group exercise plenary sessions were organized to share the experiences and clarify some of the issues raised during the group exercises. Some of the

Table 2.5 Number of Wards, Villages, and Schools in 16 LGAs as of July 2003

LGA	Number of Wards	Number of Villages	Number of Schools
Lindi DC	23	133	97
Handeni DC	19	89	98
Muheza DC	35	174	158
Mbeya MC	36	180	68
Mpanda DC	30	81	136
Liwale DC	16	42	43
Sumbawanga DC	30	198	174
Kilindi DC	15	60	73
Korogwe TC	20	133	144
Rungwe DC	30	160	195
Nachingwea DC	26	80	79
Songea TC	13	184	37
Lushoto DC	32	162	220
Mbozi DC	26	168	202
Kigoma DC	22	75	90
Kasulu DC	30	100	90
Total	403	2019	1904

*Figures are from fund management report prepared by ENV Consult LTD

issues discussed were: necessity of stakeholder analysis and how it can be realistically done; difference between vision and objectives; monitoring activities and their funding; and DSA for councilors. According to the end of the training evaluation, 23 out of 27 participants were confident of conducting planning exercise themselves and all but one respondent found the micro-planning handbook clear.

6.3 Council-level Training

Council-level Training for School Mapping

Council-level Training started in some LGAs on May 20, 2003, taking two full days and finished at all LGAs by the beginning of June. Each LGA invited council officers, ward officers, and councilors. Council officers consisted of District Education Officer (DEO), District Statistics and Logistical Officer (DSLO), council education staff and other relevant officers, while ward officers consisted of Ward Executive Officers (WEOs) and Ward Education Coordinators (WECs). The training was normally held at the district, town, or municipal council hall, Teacher Resources Centre (TRC) or a hall available at the LGA center.

Many LGAs started with sensitizing participants to become familiar with the concept of school mapping and micro-planning, followed by instruction on methodology for data collection and explanation about the questionnaires used.

Council-level Training for Micro-Planning

Council-level Training for micro-planning started on July 28, 2003, more than three weeks after the Facilitators Training. This delay was mainly caused by the fact that data entry and analysis took much longer time than originally planned. Most of the LGAs completed Council-level Training by August 2003 but some started and completed it in September 2003.

Participants consisted of council officers and ward officers as in the training for school mapping. Duration of the training was normally 5 days; covering council education planning for the first 3 days and school planning for the last 2 days. However, some LGAs conducted training for school planning first and later conducted a separate training for council education planning. The training often included group work and discussion though time was too short to cover all the steps in detail.

6.4 Ward-level Training

Ward-level Training for School Mapping

Since Ward-level Training followed soon after Council-level Training, all the 16 LGAs were able to finish all the necessary training by mid-June. In most cases two-day training was held at one of the schools in a ward and facilitated by WEC and WEO, who had attended the Council-level Training. Participants of Ward-level Training were head teachers, Village Executive Officers (VEOs) and the chairpersons of the school committees. A total of about 1,900 public primary schools received training.

Ward-level Training for School Planning

After Council-level Training, Ward-level Training went forward successively in most LGAs. Ward-level Training started on August 2, 2003, and finished by October 11, 2003. Ward officers, particularly WECs, played a major role in the training. The training took place at ward inviting head teachers, VEOs and school committee

chairpersons. Duration of the training was five days. A total of 1,900 public primary schools were all covered in the school planning exercise.