

CLASSIFICATION

PROJECT EVALUATION SUMMARY (PES) - PART I

Report Symbol U-447

1. PROJECT TITLE National Planning Project	2. PROJECT NUMBER 532-0039	3. MISSION/AID/W OFFICE USAID/Jamaica
	4. EVALUATION NUMBER (Enter the number maintained by the reporting unit e.g., Country or AID/W Administrative Code, Fiscal Year, Serial No. beginning with No. 1 each FY) <u>79-2</u>	
<input checked="" type="checkbox"/> REGULAR EVALUATION <input type="checkbox"/> SPECIAL EVALUATION		

5. KEY PROJECT IMPLEMENTATION DATES			6. ESTIMATED PROJECT FUNDING		7. PERIOD COVERED BY EVALUATION	
A. First PRO-AG or Equivalent FY <u>6/76</u>	B. Final Obligation Expected FY <u>78</u>	C. Final Input Delivery FY <u>80</u>	A. Total \$ <u>940</u>	B: U.S. \$ <u>635</u>	From (month/yr.) <u>11/77</u>	To (month/yr.) <u>11/78</u>
					Date of Evaluation Review January 1979	

8. ACTION DECISIONS APPROVED BY MISSION OR AID/W OFFICE DIRECTOR

A. List decisions and/or unresolved issues; cite those items needing further study. (NOTE: Mission decisions which anticipate AID/W or regional office action should specify type of document, e.g., airgram, SPAR, PIO, which will present detailed request.)	B. NAME OF OFFICER RESPONSIBLE FOR ACTION	C. DATE ACTION TO BE COMPLETED
1. The GOJ needs to provide a viable means for institutionalizing the PDRT or its equivalent.	GOJ	April 1, 1979
2. The PDRT or its equivalent should conduct a major portion of its future training courses in project implementation and management for the balance of the project.	GOJ/USAID	End of Project
3. A systematic means for review of priorities for use of the PDRT or its equivalent should be established.	GOJ/USAID	March 1, 1979
4. Agreement between USAID/J and GOJ needs to be reached on; (1) extension of advisors assigned to PDRT (2) how they are to be used (3) future relationship of these advisors to the Administrative Staff College (4) use of advisors assigned to Ministry of Agriculture.	USAID/GOJ	February 15, 1979
5. The manual should be completed.	PDRT Advisors	October 1, 1979

9. INVENTORY OF DOCUMENTS TO BE REVISED PER ABOVE DECISIONS			10. ALTERNATIVE DECISIONS ON FUTURE OF PROJECT		
<input type="checkbox"/> Project Paper	<input type="checkbox"/> Implementation Plan e.g., CPI Network	<input type="checkbox"/> Other (Specify)	A. <input type="checkbox"/> Continue Project Without Change		
<input checked="" type="checkbox"/> Financial Plan	<input checked="" type="checkbox"/> PIO/T		B. <input type="checkbox"/> Change Project Design and/or		
<input type="checkbox"/> Logical Framework	<input type="checkbox"/> PIO/C	<input type="checkbox"/> Other (Specify)	<input checked="" type="checkbox"/> Change Implementation Plan		
<input type="checkbox"/> Project Agreement	<input type="checkbox"/> PIO/P		C. <input type="checkbox"/> Discontinue Project		

11. PROJECT OFFICER AND HOST COUNTRY OR OTHER RANKING PARTICIPANTS AS APPROPRIATE (Names and Titles)		12. Mission/AID/W Office Director Approval	
Henry P. Johnson <i>[Signature]</i> Program Officer		Signature <i>[Signature]</i>	
Susan Merrill		Typed Name / Donor M. Lion	
		Date: <u>1/26/79</u>	

13. Summary

In the two years of project operation, a good start has been made towards achieving the goal of improving the capacity of the GOJ to plan projects. Under the project to date, the Project Development Resource Team (PDRT) has trained over 200 participants in project planning and management in approximately 42 weeks of training courses (see Annex A). PDRT has also assisted in the development of 68 projects through training and/or consultation, thus exceeding one project objective which was to assist with 56 projects over the life of the project (see Annex B). More importantly, the project has been instrumental in introducing major changes in the GOJ approach to planning. The requirement to develop project profiles for new project ideas and for these profiles to be reviewed by a Project Pre-Selection Committee has become part of the GOJ system.

Less progress has been made in meeting the goal of improving the capacity of the government to implement projects because most of the training has been focused on project planning.

A major problem has been the failure, to date, to ensure institutionalization of the PDRT or its equivalent. While a project planning system is being institutionalized, a capacity to provide continued training in planning and management is not yet in place, nor in immediate prospect.

While there is a good chance that substantial improvements in project planning and implementation will occur in certain agencies of the GOJ as a result of this project, it would be hard to demonstrate by the end of the project any direct link with the project purposes of an increased volume of foreign lending and increased rate of expenditure on foreign loans. Noticeable impact on these purposes could well come later, but only if the PDRT is somehow institutionalized so that continuous training occurs after the project ends.

Changes have occurred with respect to some of the assumptions on which the original project design was based. One assumption was that continued donor interest in financing projects in Jamaica would be sustained. As a result of Jamaica's economic difficulties, donor involvement in Jamaica has been even greater than anticipated and the need for PDRT, particularly on the implementation side, has been correspondingly greater. The IBRD, for example, has recently shown considerable interest in PDRT and is exploring the possibility of providing assistance. This IBRD interest is in itself evidence of the project's success in focusing attention on a key development constraint and starting a process of dealing with it.

A further project assumption was that domestic resources would continue to be generated and available for investment. But due to Jamaica's economic difficulties, internally generated resources have been tight. Thus a number of projects designed as a result of the advisors' efforts under this project have been shelved for lack of financing.

14. Evaluation

This is the second annual project evaluation. Its purpose is to measure progress against project goals and intended outputs, and to determine what, if any, changes might be needed in implementation of the project. Assistance was provided in the initial phases of this evaluation by Mr. Morris Solomon, who helped design the project and currently backstops it. Interviews were conducted with the GOJ Chief of the Projects Division of the Ministry of Finance and with key client ministries and agencies, and meetings have been held with the Minister of State for Planning. Questionnaires were sent to 30 participants in PDRT training courses to elicit their comments and suggestions on the courses. A thorough review of all project documents (Pro-Ag, P.P., and correspondence) and monthly reports was made. A meeting with the GOJ to review evaluation results and to agree on future courses of

actions will be held.

15. External Factors

As a result of the last evaluation, an Inter-Ministerial Steering Committee was to have been formed to assist in improving the effectiveness of the PDRT. The functions of this body were to have been: (1) to provide a means for systematically reviewing and monitoring priorities for use of PDRT; (2) to market the services of the team; and (3) to assure that required GOJ inputs were provided to the unit. This Steering Committee was never formed. While a Steering Committee per se may not be necessary, improved mechanisms to perform these functions should be considered.

For example, while the GOJ set priorities for use of the PDRT, a means for systematically reviewing priorities has not existed and is needed. Due to Jamaica's grim economic situation and consequent need to increase agricultural production and exports, the PDRT was asked by the GOJ to focus its training efforts on the agricultural and industrial sectors. These priorities were appropriate initially. The problem was that they were not shifted soon enough when planning and implementation problems were being experienced in other sectors. It was not until the fall of 1978 that priorities were reviewed by the GOJ and education was added as a new sector for training. Appropriate priorities for the future need to be addressed now.

A more serious result of the failure to establish a Steering Committee was that the PDRT had to market its own services. In the project's first year, much of the PDRT's time was spent in soliciting participants for training courses and convincing government ministries of the need for their services. This was not an efficient use of PDRT's time and resources. Due to PDRT's efforts, however, there is now a growing demand for their services in project

planning. A current need may be for some means to help PDRT to market the services it can provide in project implementation.

The following section treats GOJ performance in providing inputs.

16. Inputs:

U.S.

The project plan calls for the U.S. to provide 7 man-years of long-term assistance, over 4 man-years of short-term assistance, and \$5,000 worth of commodities. Provision of the long-term advisors has been hampered by contracting delays and the unanticipated departure of one advisor. This has limited the scope of expertise available to the PDRT, delayed completion of the training manual, and slowed PDRT's ability to initiate training in project implementation. Considerably less short-term assistance than planned has been provided because the need has been greater for the services the long-term advisors could provide.

U. S. provision of commodities has been delayed due primarily to a reluctance on the part of past USAID project managers to supply AID inputs without a fully staffed PDRT. The commodities have now been ordered and delivery is expected within a few weeks.

GOJ

In addition to the PDRT members, the GOJ was to provide logistical support for the project, including office supplies and furniture, secretaries and space for classrooms. While most of these inputs have been provided, office supplies and furniture have not been readily forthcoming, and have hindered PDRT's ability to maintain training materials, project files, and resources materials at the office. (USAID has supplied filing cabinets to help out.)

17. Outputs

1. A PDRT of four officials with a minimum of two years experience

which will be fully operational in the Projects Division of the Ministry of Finance at the conclusion of the project.

The PDRT is still not institutionalized. While 5 individuals have been assigned to PDRT for periods of time varying between 6 months and 21 months, only one of the four positions is currently filled. The principal difficulty has been the inability of PDRT located in the Projects Division to attract and hold well qualified people at the salary levels assigned by Jamaica civil service to the PDRT. The concept of the PDRT has been attractive, however, and those who have served on PDRT have done so, despite the low salary, because of dedication to PDRT's objectives and recognition of the value of experience with PDRT for career development purposes.

While the lack of an institutionalized PDRT has not prevented some progress toward the goal of improving GOJ project planning and implementation, continued progress in the future, and particularly after the project ends, will be jeopardized if a nucleus of trained and permanent trainers is not formed and located somewhere in the GOJ.

To deal with the salary issue, the GOJ project manager (and head of the Ministry of Finance Projects Division where the PDRT is now located) is considering a move of the Projects Division to the Jamaica National Investment Corporation - an autonomous agency outside the civil service system and thus having authority to contract personnel at higher salaries. When and if such a move is proposed, the USAID will carefully study its impact on the objective of institutionalizing a PDRT or equivalent capacity in the GOJ and determine whether U.S. advisory input should be continued with the

Projects Division in its new location or redirected elsewhere.

2. Work groups in Government Ministries trained in project preparation and implementation

Progress has been made toward achieving this objective in the area of project planning. Approximately 23 weeks of project preparation training courses have been conducted with participants from 9 ministries. With regard to project management training, less progress has been made. Project management and implementation should receive priority emphasis in future efforts under the project.

3. A Jamaican training manual for project preparation and execution

This training manual is intended to be a distillation of the PDRT's knowledge and experience in project design and management training. The importance of this document as a guide to future training cannot be overemphasized. Until recent months, work on this manual by one of the long-term advisors had been progressing steadily. Without the full complement of PDRT members, the advisor's time has been reallocated to training. However, the manual should be completed and 3 to 4 months of the advisor's remaining contract time should be set aside for this purpose.

18. Purposes/Goals

The stated goals of this project are to improve project planning and project implementation by the GOJ in order to increase the expenditure rate and volume of foreign loans and grants. It is simply not possible to demonstrate that this project has contributed directly to either a greater volume of new foreign loans and grants or a greater expenditure rate on existing ones. Too many other factors are at play. Nevertheless, in the past two years, the PDRT has assisted in the planning of approximately 68 projects, compared to the

target figure of 56 throughout the life of the project. In addition, 20 projects have been developed by the Ministry of Agriculture (MOA) Production Unit in a 10 month period in 1978, compared to a target figure of 24 for the entire life of the project. On the implementation side, as pointed out previously, little progress has been made because the GOJ requested the PDRT to focus initially on planning. However, during the summer of 1978, the responsibilities of the Projects Division were expanded to include project monitoring and management. As a result, PDRT's area of emphasis in training began to shift to project implementation.

19. Beneficiaries

The National Planning Project focuses primarily on upgrading the project design and management capabilities of those Jamaican civil servants involved in project preparation and implementation. The immediate beneficiaries are the participants in PDRT training courses who have been exposed to improved project planning and implementation practices. Feed-back from the evaluation interviews and questionnaires indicates that these participants have found the concepts and methods taught by the PDRT to be easily applicable to their work and very valuable in instituting better project design and management.

20. Unplanned Effects

Although unplanned, one of PDRT's major contributions to the success of this project has been the establishment of a project review and approval system for the GOJ. Through the use of feasibility studies, interministerial review, and through technical analysis, this system has had some impact in improving the quality of GOJ projects.

One of the PDRT's roles at the present time, which was not included in the project design, is serving as adjunct staff for the Administrative Staff College's (ASC) project related training. The ASC is a part of the

Ministry of Public Service and is designed to provide in-service training for GOJ senior-level personnel. Staffed by only 3 professionals, the ASC has used the PDRT to conduct 19 weeks of training courses (one 9 week and one 10 week course). The long-term advisor to the PDRT, in conjunction with ASC, is currently developing training materials for ASC courses. While the ASC was not foreseen as a principal base of this training, the PDRT has gained valuable exposure in addition to providing training to the senior level personnel attending the College. In addition, one member trained in PDRT presently serves on the staff of the College and another is receiving graduate training prior to returning to the staff. One possible alternative for institutionalizing the PDRT that may be considered would be to build a team of qualified trainers in project planning and management into the permanent staff of ASC.