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PROJECT ASSISTANCE COMPLETION REPORT

BASIC SKILLS TRAINING PROJECT NO. 532-0083

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PROJECT PURPOSE

The Basic Skills Training Project No. 532-0083, herein after referred to as the BSTP, was signed between the Government of Jamaica and the United States Agency for International Development on August 5, 1983 and concluded on July 31, 1991 after two extensions of the Project Assistance Completion Date (PACD).

The purpose of the project was to establish an improved skills training system responsive to the Government of Jamaica's economic policies and labor market needs.

The original project design was to pursue a focussed and internally integrated approach to meeting the long and short term training requirements of Jamaica's private sector.

The project consisted of three components:

- (1) assisting with the institutional development of the Human Employment and Resource Training (H.E.A.R.T.) Trust to perform the functions of a National Training Agency (N.T.A.) to regulate, evaluate, fund, promote and coordinate new and existing skill training programs included in the GOJ's desired skills training system;
- (2) upgrading and expansion of non-formal skills training programs and services within the Ministry of Youth and Community Development; and
- (3) upgrading and expansion of formal technical level skills in academies where H.E.A.R.T. assumed operational responsibilities from the Ministry of Youth.

An external evaluation done in December 1988 recommended specific activities to more effectively achieve the objectives of these components. The evaluation also recommended that Policy Studies be carried out to assist the GOJ to address a number of issues and problems affecting Technical Vocational Education and Training (TVET) in Jamaica. Follow-up technical assistance from these studies assisted with the restructuring of the H.E.A.R.T. Trust to carry out its original mandate and as a result, the National Training Agency (N.T.A) was launched in July 1991. The Ministry of Education was made responsible for the H.E.A.R.T. Trust, and at the end of the project originally planned outputs were in place and significant progress had been made toward achievement of project purpose. Also, a momentum was created for the N.T.A. to proceed on a planned path.

FINANCIAL STATUS

The BSTP was designed with a Life of Project (LOP) funding of US\$4,900,000 grant contribution and US\$8,500,000 loan contribution by USAID and resources to be provided by the GOJ of not less than a total equivalent of US\$46,544,000, including costs to be borne on an "in-kind" basis.

The actual GOJ total contribution to the project was approximately US\$50,958,000.

USAID total obligation under the project was provided as follows:

	<u>Date</u>	<u>Loan</u>	<u>Grant</u>
Obligation:	08/05/84	\$5,000,000	\$ 950,000
(Amendments)	03/28/84	3,150,000	800,000
	03/05/85	350,000	1,000,000
	04/22/86	-	400,000
	09/30/88	-	800,000
	08/31/89	-	400,000
	12/29/89	-	500,000
		<u>\$8,500,000</u>	<u>\$4,850,000</u>
		=====	=====

The above shows a total USAID contribution of US\$13,350,000.

The original LOP was six years (August 5, 1983 - August 1, 1989). The project was extended for the first time to December 31, 1990. The purpose of this extension was to give the GOJ time to implement recommendations on how to complete the project effectively made in the Project Evaluation December 1988. The second extension from December 31, 1990 to July 31, 1991 was to complete follow on activities recommended in the Policy Studies and to assist the GOJ to develop an operational plan for the new National Training Agency (NTA) which would be responsible for monitoring the Technical/Vocational Education and Training (TVET) system in Jamaica. Both these extensions were "no fund extensions". Unused funds which were tied up in old PIOs were deobligated and utilized to implement the Revised Project Implementation Plan which resulted from recommendations of the December 1988 external evaluation.

Project Management

The Project was managed by a Project Management Committee (PMC) which was comprised of a Chairman from the H.E.A.R.T. Trust, the USAID Director of the Office of Education and Human Resources, the USAID Project Officer, the GE Chief of Party, a representative from each component of the project, the Ministry of Finance and the private sector.

Each component was implemented by a Project Implementation Unit (PIU) which reported to the PMC. All basic implementation issues were addressed in meetings which were held monthly, and unsolved problems were taken to the PMC. At the beginning of the Project a Procurement Committee was put into operation. However, after the evaluation when major procurement was complete, procurement issues were dealt with in the PMC.

After the evaluation, committees were set up to monitor the further development of a Management Information System (MIS), the Policy Studies and Tracer Studies; in these areas the PIUs were guided by these committees. The USAID Project Officer was an active member of all these committees.

The Project contained the following elements in the basic design:

- (1) Technical Assistance
- (2) Participant Training
- (3) Equipment
- (4) Innovative Education Technology
- (5) Construction
- (6) Research
- (7) Policy Studies

These elements are discussed in detail in the following sections. A table showing planned vs actual obligations and final disbursements for the above elements are shown in Appendix I.

TECHNICAL ASSISTANCE

GE Government Services, formerly RCA Services Company, served as prime contractor and was responsible for providing technical assistance in planning, management, procurement of services, participant training and equipment.

Relevant technical assistance was provided to the three components and, while it was agreed that an integrated approach would be used where appropriate, very little integration took place; there were no inter-agency agreements. The ministries/agencies maintained individualistic approaches e.g. to curriculum and most if not all technical assistance remained discrete to each component. Technical assistance under each component is discussed below:

H.E.A.R.T. Trust

The H.E.A.R.T. Trust was established by legislation in September, 1990. It is a quasi-autonomous statutory body which was attached to the Office of the Prime Minister from its inception. However, in 1989 the new government transferred oversight responsibility to the Ministry of Education. The Trust is managed by the an Executive Director reporting to a Board of Directors composed of ten members from the public sector and ten members from the private sector. The Trust is funded from a 3 percent payroll tax on all firms with a yearly payroll of more than J\$87,000 per year (the estimated tax revenue from the payroll tax is J\$30 million per year).

The Trust's function is:

- (a) to develop, encourage, monitor and provide finance for employment training;
- (b) to provide employment opportunities for trainees;
- (c) to promote employment projects.

The major objectives of this project component were: the institutional development of the Trust to strengthen the GOJ's ability to ensure better coordination among skill training institutions; to respond to the private and public sectors' training needs in an innovative flexible manner; and to develop the technical and managerial capacity to provide an adequate supply of appropriately trained, technical and supervisory level personnel.

To coordinate these activities, the H.E.A.R.T. Trust required technical assistance for institution building. Technical assistance through the BSTP was therefore directed towards assisting the Trust to set up management systems and inter-agency agreements. However,

during the project period the Trust was assigned operational responsibility for H.E.A.R.T. academies and its original mandate was de-emphasized. Technical assistance to assist with the establishment of these academies was, therefore, given through the H.E.A.R.T. Trust.

Major technical assistance provided was as follows:

For the Trust

(1) Management Information System (MIS): Development of the MIS and automation of the Trust activities was achieved. Several programs were developed and are being implemented e.g. information on the trainees while in training and tracer studies after placement, equipment inventory, personnel and fiscal information and accountability.

(2) Administrative: Procedures for fiscal audit and analysis were set up and are in operation in the N.T.A.

Operation of H.E.A.R.T. Academies

Management systems for H.E.A.R.T. academies were developed and an Operations Manual was prepared.

Development, review, validation and implementation of curricula for H.E.A.R.T. academies were carried out on an on-going basis over the project period.

Tracer studies on graduates of the H.E.A.R.T. program were conducted. These studies assisted the newly established N.T.A. to identify demand for skills and training content to better enable the organization to respond to the private sector.

Ministry of Youth and Community Development (MYCD)

The objectives of this component were to develop the technical and managerial capability of the MYCD through the Non-Formal Education Division (NFED) to update non-formal curricula and instructional technology and operate H.E.A.R.T. academies.

Although non-formal skills training specialists were assigned to the MYCD and the VTDI, not much was achieved because academies was shifted to the H.E.A.R.T. Trust, and the NFED was never established in the Ministry of Youth. There was, therefore, some wastage of technical assistance during the early years of the project. However, during the last year of the project, technical assistance was given to assist the Ministry to establish new vocational training centers.

Ministry of Education

The 1988 evaluation showed that technical assistance provided for this component was some of the most successful.

All teachers/instructors in the technical schools were evaluated individually in order to establish training requirements. As a result several teachers were sent on training programs to the U.S. and the College of Arts, Science and Technology (CAST), in the areas of pedagogical skills, management of schools and information systems and specialized areas of technical/vocational education.

Adoption of a Competency Based Vocational Education (CBVE) curricula, one of the goals of the project, was achieved under this component, and teachers were trained to implement these curricula. Areas covered were business education, home economics, automechanics and entrepreneurial skills. The Project Manager in the Ministry of Education reports that the passing rate of students on examinations in skill areas covered by the CBVE curricula improved by 45%.

A tracer study design to include job placement and guidance counselling was prepared and tested in one technical school.

A Management Information System was established for the eleven technical schools and the Technical/Vocational Unit in the Ministry of Education. Among the programs developed for the system were Student Information, Personnel, Inventory and Tracer Studies. These programs are being implemented in the schools on a phased-in basis i.e., not all the schools have all the programs at this time. The Ministry has plans for coverage of the system to be expanded over time, e.g., the Ministry will continue to add new programs to the MIS.

PARTICIPANT TRAINING

H.E.A.R.T. Trust

Early in the project, the Trust became overwhelmed with operational responsibilities, and not many members of administrative staff were able to attend training courses that would prepare them to assist with the institutional development of the Trust.

Despite this, twenty-nine participants were trained overseas - one received long term training and obtained a B.A. in General Management - the others participated in training programs dealing with curriculum development, planning, management of institutions and information systems, guidance counselling and performance testing. Principals and other staff members of the H.E.A.R.T. academies also participated in these courses and observation sessions at Job Corps centers in the U.S.

Several participants from all the components of the project attended the American Vocational Association (A.V.A.) annual conventions. GE identified the convention as very good training ground for technical/vocational personnel. Reports from the participants verified benefits gained. As a result several participants are now members of the association and continue to attend the annual conventions.

In-country workshops and training sessions were conducted by the technical assistance team in the areas of institution operations, guidance counselling, curriculum development and testing. It is estimated that over LOP there were over 80 workshops and training sessions of varying sizes with an average of 30 people participating.

Ministry of Youth and Community Development

The Ministry of Youth and Community Development was responsible for the Non-Formal Skills training component for the first three years of the project. During this period several participants received training. Five participants received Bachelors degrees in various areas of technical/vocational education and one completed work on a Masters degree. All these participants are still working in the tech/voc education system in the Ministry of Youth and in the H.E.A.R.T./N.T.A. offices.

Over 30 participants participated in other training programs abroad. Although many of these individuals are still employed in the tech/voc system, there has been an attrition rate of approximately 40%.

The H.E.A.R.T. Trust conducted local in-service training programs for over six hundred individuals from the Trust, the Vocational Training and Development Institute (VTDI), the Social Development Commission (SDC), the Non-Formal Education Division in the Ministry of Youth and Community Development (MYCD) and the H.E.A.R.T. academies in the areas of job placement and counselling, curriculum development and vocational education management and supervision.

Ministry of Education

Nine participants in this component gained Bachelors and Masters degrees from universities abroad, while twenty-four participants attended short term training courses, observation tours and AVA conferences. All these courses were in pedagogical skills, curriculum development, management of institutions and information systems and other specific skill areas. The project also assisted with a 3-year program at CAST for 30 school leavers who gained teaching diplomas in tech/voc education and training. These were all placed in the teaching system.

As a result of the assessment system for teacher/instructors in all technical schools, the Ministry of Education now has an on-going upgrading program which is conducted in the summer. After three years they receive diplomas.

The Ministry has conducted local seminars and in-service training programs in tech/voc education for approximately 1000 persons.

There is no doubt that training received under this component enabled the TVU in the Ministry to upgrade its management capabilities. Teachers and instructors in the schools and CAST, have upgraded their pedagogical and instructional methodologies and are now able to deliver better training programs to students. The problem still remains that these participants are a part of the larger system which suffers from low remuneration and lack of incentives, and as a result, the rate of attrition continues to be high.

EQUIPMENT AND INNOVATIVE TECHNOLOGY MATERIAL

Equipment procurement for this project consisted of vocational equipment, materials and supplies, data processing hardware and software and related innovative technology materials. Over US\$6.4 million in USAID funds was spent for procurement of these equipment.

The prime contractor, GE (formerly RCA) had responsibility for "identification of specific needs, development of specifications, scheduling of procurement and installation of both categories (basic and innovative) shown above."

Over the life of project two Procurement Service Agents (PSAs) - RONCO and MANCOR had contracts for supplying basic equipment and GE (RCA) was "responsible for procurement of all equipment, supplies and materials required for the innovative technology segment....". However, during implementation it was evident that there was a fine line of difference between basic and innovative equipment and it was agreed that both the PSA and GE would procure equipment as required.

Equipment procurement for the three components of the project breaks out as follows:

H.E.A.R.T. Trust

Two vehicles were purchased through the Trust for the transportation of the prime contractors (GE). A Computer/Data Processor System was also procured in 1987, and in 1990 additional computer hardware and software were purchased to support the development of a Management Information System for the Trust. Since the restructuring of H.E.A.R.T. this equipment is now installed at the Information Development Center in Papine. The GOJ supplied all other equipment and furnishings.

Non-Formal Skills Training Component

The H.E.A.R.T. Trust was responsible for the procurement of basic equipment for H.E.A.R.T. academies which included the four assisted by the BST Project. The Trust provided furnishings and some equipment for the academies. However, additional equipment was purchased through the BST as follows:

Portmore

This academy conducts training in the construction skills. One or two pieces of equipment were carried over to this academy from the inventories of the old Industrial Training Centers. However, agreement was reached to fully equip seven workshops through the PSA RONCO in 1984, i.e. carpentry, electrical, welding, pipe fitting, steel fixing, plumbing and painting. This equipment was delivered and fully installed.

Garmex

This academy prepares trainees to work in manufacture and design aspects of the garment industry. It is fully equipped in a factory-like formation with state-of-the-art sewing machinery and equipment related to the industry.

Kenilworth

This academy provides training in garment design and manufacture and data entry. It was supplied with sewing machinery similar to Garmex and computers similar to Stony Hill.

Stony Hill

This academy provides training in business practices and data entry. It was equipped with business equipment and computers.

Formal Component - Ministry of Education

Under this component equipment was purchased for eleven technical schools, the College of Arts, Science and Technology (CAST) and the Technical Vocational Unit (TVU) of the Ministry of Education. The equipment purchased for the schools related to three priority areas established for each school. Priorities were drawn from the areas of machinery and welding, electronics, automechanics, business education, building construction, home economics, agriculture, plumbing and pipe fitting. All equipment ordered was delivered to the schools. In addition, approximately US\$1,000,000 worth of science equipment was supplied and installed in the laboratories of the eleven technical schools. These laboratories are functioning at different levels in the schools, as some are fully established and some are not yet complete. Equipping of the science laboratories in these schools was part of the upgrading programs for these schools.

Overall Status of Procurement

Procurement of equipment under this project was a complex and large task. The process was implemented and monitored by a Procurement Committee which was comprised of the prime contractors, the USAID Project Officer, equipment officers from the formal and non-formal components, the H.E.A.R.T. Project Coordinator and instructors from the institutions for which equipment was being purchased. This committee reported to the Project Management Committee (PMC).

The procurement process was organized as follows: GE prepared specifications for equipment along with H.E.A.R.T. and the Ministry of Education; PSAs were responsible for purchasing, technical inspection of equipment, shipping and documentation and delivery schedules. The GOJ, through the Department of Supplies, set up clearances at the port and delivery to warehouses. The H.E.A.R.T. Trust and the Ministry of Education set up delivery to schools and

institutions. USAID assisted with preparation of PIO/Cs, waivers, financial administration and monitoring of usage and maintenance of equipment. These tasks were approached systematically, but given the magnitude of procurement, errors still affected the process.

At Portmore a small percentage of equipment did not meet specifications or did not meet needs, e.g. an Occupational Evaluation System consisting of study carrels was provided to assess students who applied for entry into the Academy. This was innovative technology which was not easily adapted in the training system and was therefore not used. However, good sense prevailed and the system was returned to the supplier. Other equipment which did not meet the required specifications was returned and replaced or reordered.

Other constraints, endemic to the GOJ procurement system, prevailed throughout LOP. The long time taken to clear goods from the ports caused thefts and made insurance claims impossible. Delayed shipment occurred when GE waited until enough equipment to fill a large container was supplied. The sources of some equipment were not identifiable when orders were prepared, necessitating waiver requests which took time.

One other major concern was the electrification of some of the institutions e.g., electricity to Portmore was not sufficient to carry large electrical equipment and machines, and at Stony Hill the computers malfunctioned because of low voltage.

Apart from these issues, all goods ordered were supplied, delivered and installed in the institutions. It should be noted that not all science equipment for the eleven technical schools was in place at PACD since some schools needed to upgrade their physical facilities.

Although most of these problems were corrected, the GOJ needs to synchronize electric supply with the power demand of the equipment being purchased.

It is difficult to monitor usage of small tools which have short life expectancy. The question arises as to whether USAID should fund the purchase of such small equipment on future projects.

The problem of maintenance continues. The GOJ writes letters to say that maintenance schedules and contracts are in place, but when a government needs to modify the nation's budget the first item which is decreased is "Maintenance". Although all public sector institutions suffer from low maintenance budgets, schools and learning institutions seem to be hardest hit. It may be a difficult Condition Precedent to impose, but it is suggested that before USAID consider the purchasing of equipment, particularly high tech equipment, that one condition precedent be assurance that there are solid maintenance plans and budgets in place.

CONSTRUCTION

Assistance with construction of facilities was not included in the original design of the project. However, at the request of the GOJ, the project agreement was amended to include funding of construction costs for three facilities from the "Inflation" line item of the project budget as outlined below:

Expansion of the Kingston Technical School

The Kingston Technical School is the oldest technical school on the island. It was built several years ago to assist children of working class families who could not afford to send them to high school. It is situated in the inner city and serves a wide cross section of Kingston and St. Andrew, as well as students from all over the island; it has a long-standing good reputation. The Ministry of Education, realizing that the demand had surpassed school facilities, acquired an old building immediately in front of the school and requested assistance to renovate it through the BST Project. This was agreed to and a fixed price contract for J\$1,378,515.12 was awarded in 1987. The building has been completed and is now a part of the school facility

Herbert Morrison Technical High School

This school, which is situated in Montego Bay, St. James, was a comprehensive high school, and was upgraded by the Ministry of Education to the level of technical school. Part of the upgrading process included increased skills training. The school, therefore, needed facilities to accommodate additional skills training workshops. The Ministry requested assistance to construct these workshops through the BST Project. A fixed price contract in the sum of J\$2,332,762.56 was awarded in September, 1988. Construction has been completed and the workshops are in operation.

Kenilworth H.E.A.R.T. Academy

The GOJ decided to utilize existing facilities in the rural areas to establish new H.E.A.R.T. academies. One such facility is Kenilworth which was originally an Industrial Training Center (ITC) situated in Hanover. However, this facility required renovation and improvement to accommodate a H.E.A.R.T. academy. The GOJ started renovation of the complex but was strapped for funds and requested assistance under the BSTP. In 1987 a Fixed Amount Reimbursement Agreement (FARA) for US\$400,000 was committed for this purpose. US\$398,884 was disbursed to renovate a building for housing the computer training workshop.

POLICY STUDIES

The Policy Studies which were conducted to assist the GOJ to identify the problems in the Technical Vocation Education and Training system (TVET), traced ineffectiveness of the system to fragmentation, lack of planning, coordination and standardization. These Studies recommended re-structuring of the H.E.A.R.T. Trust to rationalize the system. Based on these recommendations the project financed follow-up technical assistance which developed proposals for re-structuring the Trust. These proposals included recommendations for a new organizational structure responsible for planning and evaluating operational systems to ensure increased relevancy, cost-effectiveness and efficiency for TVET in Jamaica. Follow-up technical assistance also made recommendations for private sector involvement with the new National Training Agency to validate TVET training programs, competency and employability of trainees.

TRAINEE OUTPUT

At PACD 10,827 female, (185% of planned) and 2909 male (149% of planned) were trained in the H.E.A.R.T. academies. Tracer Studies show that 70-75% have been placed in jobs related to the skills in which they were trained and others are self-employed or employed in other fields.

In the technical schools 10,847 female (146% of planned) and 9,743 male (116% of planned) have graduated. The Ministry of Education has reported that examination results are better for those students who were trained through the Competency Based Vocational Education (CBVE) curriculum, when compared to other students who did not have use of these facilities.

LESSONS LEARNED

The project design failed to fully anticipate implementation constraints. USAID continues to design projects to include more than one government ministry/institution. This has not proven practical in the past and did not work in the BSTP as the ministries/institutions failed to establish interagency agreements and continued to protect their own turf.

The absorptive capacity of participating agencies was over estimated, as many times the same incumbent served as counterpart to several technical assistance teams, or sometimes there were no counterparts and so the assistance was not passed on and used in the system.

The involvement of the private sector was minimal and, although there were private sector committees, members were not involved in decision making. Although a condition precedent to the project was the establishment of a National Training Board of which 50% was to be private sector, the sector was not given a mandate to take on any specific responsibilities.

GENERAL

A post project impact evaluation is planned to take place in 1993. The GOJ has requested that they have an input to the scope of this evaluation to assure that it assesses relevancy of training programs, cost effectiveness and demand for specialized skill training.

ATTACHMENT 1

PROJECT BUDGET

BASIC SKILLS TRAINING PROJECT NO. 532-0083

(US\$)

<u>Project Inputs</u>	<u>Planned</u>		<u>Actual</u>	
	<u>AID</u>	<u>GOJ</u>	<u>AID</u>	<u>GOJ</u>
<u>Grant</u>				
1. Technical Assistance	3,735,000	2,100,000	3,704,304	2,100,000
2. Policy Studies and Analyses	115,000	31,000	112,453	31,000
3. Contingency	500,000	-	465,396	-
4. Equipment	<u>500,000</u>	<u>-</u>	<u>449,512</u>	<u>-</u>
Total Grant	<u>4,850,000</u>	<u>2,131,000</u>	<u>4,731,665</u>	<u>2,131,000</u>
<u>Loan</u>				
5. Participant Training	940,000	1,590,000	899,237	1,590,000
6. Equipment	3,690,000	11,322,000	3,472,462	11,322,000
7. Other				
a) Education Technology	2,085,000	381,000	1,996,047	381,000
b) Workshop/Seminars	-	846,000	-	846,000
c) Research & Support-	-	2,287,000	-	2,287,000
d) Local Personnel	-	2,749,000	-	2,749,000
e) Construction/ Renovation	1,157,000	28,531,000	1,042,083	28,531,000
f) Misc. (Other Cost-	-	1,121,000	-	1,121,000
8. Technical Assistance	500,000	-	704,183	-
9. Contingency	-	-	-	-
10. Inflation	<u>128,000</u>	<u>-</u>	<u>128,000</u>	<u>-</u>
Total Loan	<u>8,500,000</u>	<u>48,827,000</u>	<u>8,242,012</u>	<u>48,827,000</u>
<u>Total Loan & Grant</u>	<u>13,350,000</u>	<u>50,958,000</u>	<u>12,973,677</u>	<u>50,958,000*</u>

*Documentation is available to substantiate at a minimum the planned amount in the Project Agreement.

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