

# Primary Education Portfolio Review

## Introduction

1. This portfolio review, a preliminary step in an Operations Evaluation Department (OED) evaluation of World Bank support to primary education since 1990, examines Bank lending support to primary education as revealed in its databases and documents. The purpose of the review is to inform the Education Sector Board's FY2005 strategy update and to help frame questions and issues for the full OED evaluation of primary education to be delivered in FY2006. The review answers three questions:

- What have been the recent trends in the volume and substance of Bank lending for primary education?
- Does the lending portfolio address the Bank's primary education policies?
- How well have primary education projects performed?

2. For lending volume and substance, the review considered all projects (IDA and IBRD, investment and adjustment) making any allocation to primary education, including those from non-education sectors having primary education components. When examining project performance, the review considered projects allocating at least half of their funding to primary education. At the close of FY2004 there were 436 projects having some allocation to primary education, of which 188 allocated at least half to primary education. For in-depth analysis, the review drew a stratified random sample of 35 closed and ongoing primary education projects, and a purposive sample of 15 projects with the highest allocations to primary education from other sectors.

## Policy Context

3. During the 1990s and into the current decade World Bank policy on primary education was conveyed in a series of papers and publications, including a 1990 policy paper and several strategy papers and updates. These formed the basis for the Bank's sponsorship of the Education for All (EFA) movement, launched in 1990 in Jomtien, Thailand, and renewed in the year 2000 in Dakar, Senegal. Bank *policy objectives* on EFA have been consistent over the past 15 years and can be summarized as: (a) universal primary school completion; (b) equality of access for girls (gender parity) and other under-served groups; and (c) improved student learning outcomes. *Sector strategy* (means of reaching the objectives) has been more varied over the years, ranging from efficient use of resources to reforming teacher training to management decentralization and other systemic reforms. The various strategies also called for the application of *operating principles* such as "focus on the client," "focus on development impact," and "productive partnerships." The *priority recipients* for primary education assistance have basically been of two kinds: countries with reform agendas and/or good governance (1990 and 2002); and the poorest countries and, within countries, the poorest people (1995 and 1999).

## Recent Trends in Bank Lending for Primary Education

4. During FY1990 to FY2004, World Bank lending for primary education totaled about \$10.2 billion, a six fold increase over all lending for primary education during previous periods (1963-1989). Thus, 86 percent of all Bank lending for primary education has occurred since 1990. About two-thirds of the projects providing some support to primary education received IDA credits. In the most recent five-year period (2000-04), the share of Bank education funding going to primary was 37.5 percent; if half of the lending coded in the Bank's databases as "general

education” lending is assumed to cover primary education, primary education accounts for 47 percent. The Africa region has had the highest number of projects with primary education components, but South Asia has had the largest financial commitment to the subsector. Funding for primary education through projects in other sectors has increased rapidly in recent years, comprising between 33 percent and 42 percent of all lending to primary education during 2000-04, depending on the share of “general education” assumed to be for primary. Before the mid-1990s, most of funding for primary education went to hardware (civil works and material support), but in more recent years that has fallen to just over 50 percent. Disbursement rates for primary education projects have been relatively high (IBRD projects, 98 percent; IDA, 93 percent) with better rates for hardware than for software.

### **Implementation of Sector Policies**

5. Most of the projects reviewed addressed Bank *policy objectives*, but with varying degrees of effectiveness, as follows:

- Increasing enrollment in primary education has widely been addressed, often using outcomes evaluation criteria, and has largely been implemented. Primary school completion (based on the proxy of improving internal efficiency) has not been addressed so well, and has been less frequently evaluated with outcomes indicators; efforts at it have been relatively unsuccessful.
- Girls’ access has not been emphasized in every region, but in 2 of 3 regions where boy-girl parity was low in the 1990s (Sub-Saharan Africa and South Asia, but not the Middle East and North Africa) attention to it increased substantially; also, where girls’ access was addressed, outcomes indicators were frequently used, and efforts were largely successful.
- Educational quality has been addressed everywhere, but – except for quite recently – evaluated more by outputs than by outcomes; project performance on this objective generally quite weak.
- Improving sector governance has also been addressed everywhere, but also evaluated more by outputs than by outcomes, and showing weak performance.

6. Concerning *Sector strategy* implementation, over the 1990s primary education projects showed a relatively low or declining interest in student learning assessments, preservice teacher training, and central management; and high or increasing use of in-service training, decentralized management, textbook provision, and school construction. Activities implemented relatively effectively were school construction, textbook provision, and school level management; those implemented relatively ineffectively were pre-service teacher training and central management. Concerning *operating principles*, productive partnerships (with other development agencies) were on the increase in the late 1990s, especially in textbook provision and school construction, but focus on development impact was weak, given the frequent lack of outcome/impact indicators and very few impact studies. Changes in *priority recipients* have been progressive, with poorer countries receiving an increasing share. Primary education projects were rated relatively high by OED on outcomes, somewhat below other education sectors on sustainability, and very low on institutional development.

### **Conclusions**

7. *Need to Focus on Learning Outcomes*. The call in the 1990 policy paper for a focus on student learning outcomes has still not been heeded in a large proportion of Bank supported primary school projects, even though most are now supporting the goal of quality improvement. Even the Millennium Development Goals and the Fast Track Initiative set outputs – universal completion and gender parity – rather than learning outcomes as their objectives. However, this should not

prevent the Education Sector from ensuring that attainment of basic knowledge and skills is a priority in future lending for primary education.

8. *Outcomes-Based Monitoring and Evaluation.* Relatively few primary education projects had plans for evaluating their objectives through outcome indicators, especially in the case of objectives covering quality improvement and sector governance. Moreover, a large proportion of projects with plans to use outcome indicators (like tracking student achievement) fail to follow through on such plans. Without such measures, it will never be clear whether projects have had impacts beyond the delivery of goods and services.

9. *Improving Institutional Development.* Institutional development in the primary education portfolio has been unusually low – well below that for the other education subsectors. It was not possible to identify reasons for this, but the data offer some hints. For example, although most primary school projects aspire to improve sector management, few focus on changes in management behavior (compared to the delivery of inputs). A late 1990s improvement in both the ratings and the number of projects using outcome measures for improved sector management may show a way forward. Meanwhile, very low ratings for institutional development in Africa and Europe/Central Asia call for further investigations and problem solving by country/sector teams.

10. *Lending for Primary Education by Other Sectors.* During the past five years, other sectors have provided up to 40 percent of the Bank funding for primary education. However, they are financing little more than new school buildings, a concern given the multitude of factors needed for good educational outcomes. Being quite recent, most of the non-education sector projects having primary education components have not yet been evaluated. When they are, the education components should be evaluated separately on outcomes, sustainability, and institutional development. Meanwhile, this evaluation will study them in country context during its next phase; moreover, the ongoing OED evaluation of Community Driven Development (CDD), which covers a large subset of these projects, is due to produce results soon (2005).

11. *Improving the Sector's Ability to Track Primary Education Lending.* The Bank's education lending databases are inconsistent and often ambiguous with respect to primary education lending. Although the project data are basically complete, up-to-date, and accessible, their many weaknesses and ambiguities limit a full understanding of the magnitude of Bank support to the various subsectors. The Sector needs to take further steps to improve the quality and consistency of education project data, at least by reconciling the differences between Edstats and Business Warehouse codings, strengthening the accuracy and consistency of project coding by task team leaders, and by working with OPCS to change the way the "general education" code is used.

12. *Implications of the Findings for the Next Steps of the OED Evaluation.* A desk-based portfolio review faces numerous constraints that limit its ability to influence sector policy and programming – inadequate data, incongruent data sets, and problematic data coding. In the final report of the primary education evaluation, these limits will need to be overcome (especially the coding problems). In addition, there should be an assessment of project efficiency, which is missing from this portfolio review. Adding this in the final evaluation will enable observations about the cost-effectiveness of many of the activities that are relatively effective (textbooks, school buildings, and school-based management).

13. In the next phase of this evaluation the team will move from project-level analysis to country-level analysis, using desk reviews and case studies. The analysis will provide an integrated view of lending plus the other avenues of Bank support: policy dialogue, training and technical assistance, and analytic work. All of these efforts will be viewed in the context of

country social and economic conditions, government policy, strategies, and plans (especially related to Education for All), movements in other subsectors, issues and changes in the political economy, the programs of other development agencies and partnerships, and any country involvement with the Fast Track Initiative.

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