

# **STRATEGIC PLAN**

## **2003 - 2007**

**(Final Version – February 2003)**

February 2003

## **Preface**

The Ministry of Education in Zambia has formulated this *Five-Year Education Sector Strategic Plan* to address the needs of the Zambian people in the field of education. It has long been recognised that the greatest asset of any country is its human resources. An educated population will be the leading force in the overall development of the country, as well as contributing to a reduction in the poverty levels. Above all education is a basic human right for each individual in society.

This 5 year Strategic Plan (2003-2007) has been based mostly on three key documents: *'Educating our Future'* 1996, the *Poverty Reduction Strategy Paper* (2001/2002), and the *Report on the Restructuring and Decentralisation of the Ministry of Education* (2000). Commitments to Education For All, undertaken by Zambia and the world community at Jomtien in 1990 and reaffirmed at Dakar in 2000, inform this Strategic Plan. The Plan is also guided by a holistic approach to education which recognizes the inter-linkages and interdependencies between the various stages, beginning with early childhood education, running through formal basic and high school provision, encompassing skills training, university and other tertiary institutions, and extending to adult basic education as well as lifelong education.

The strategic planning started in May 2001 through a broadly consultative and participatory process. The Ministry established a Strategic Planning Task Force and the Strategic Planning Secretariat with representatives from other line Ministries, key NGOs and development partners, along with senior managers from the Ministry. In addition, four task forces were established for Basic, High School, Tertiary Education and Administrative Services to carry out the sub-sector reviews. These comprised participants from a wide group of stakeholders.

Broad consultation was carried out through field visits in all provinces and consultative stakeholder workshops. Those consulted included pupils, parents, teachers, community leaders, civil society representatives, personnel from the Ministry of Finance and National Planning, other line ministries and international development partners. The planning process included major inputs from all District and Provincial Education Offices, in addition to senior management from the Headquarters and the two Universities.

Access and quality are seen as the major challenges facing Zambia in education. In order for the Ministry of Education to overcome these challenges, it will be necessary to solicit active participation from the broadest spectrum of stakeholders. These include other government agencies and ministries, wide representation from civil society, religious organisations, the private sector and international development agencies. In particular, these challenges must be addressed through teachers and lecturers, who are the front line in the provision of education. Lastly, and most importantly, the parents and the learners must participate in the process of change that will lead to greater access and quality in education.

The government has demonstrated a serious commitment to improving access by the announcement of Free Basic Education for Grades 1-7 in February 2002. This was followed by increased budgetary allocation to the sector. It is essential that this level of allocation is maintained and increased as Zambia's education budget has been one of the lowest in the region. It is also hoped that an increased level of commitment by the government will be matched by additional financial and moral support from communities and our development partners to ensure the successful implementation of this Plan.

*Permanent Secretary  
Ministry of Education*

# 1 Acknowledgement

Development of the Sector Plan for the Ministry of Education commenced in June of 2001 on a full scale. Although this could have been done as a desk exercise by a small group of consultants, the Ministry chose the long path of taking every conceivable group of stakeholders on board. The enthusiasm, willingness and tremendous support the Ministry has received in this effort cannot go without mention.

First and foremost we remember and honour the late Christopher Isaac Zulu, former Chief Inspector of Schools who upon retirement kindly agreed to work on a full time basis as chairperson of the Strategic Planning Secretariat. The Ministry, and in particular the secretariat, overwhelmingly benefited from the vast and rich experience of Christopher Isaac Zulu in a manner words cannot describe. Though the time he spent on this assignment was short comparative to the length of the process, he effectively contributed to setting a firm and solid foundation upon which the end product we proudly see today was built.

We are grateful to the Minister of Education for the policy direction and encouragement. We also pay special tribute to the women and men of vast experience and knowledge in the field of education who sat on the overall strategic planning task force for the policy and professional direction they provided, and more so acknowledge the contributions of the then chairperson Dr. S M Kasanda who was Permanent Secretary at the time. In the same vein we thank members of the four sub-sector task forces who held nothing back to make informed contributions towards the development of the sector plan. Special mention should be made of the dedication and productivity of the Strategic Planning Secretariat who steered and co-ordinated the process throughout.

The Ministry will remain forever indebted to its own pupils and students, the teachers and lecturers, teacher unions, churches, NGOs, and parents for the support they gave this process at institutional, district, provincial and national levels. Further, the two universities had shown very high-level commitment to the entire process that we feel encouraged in this undertaking of rebuilding our country through education. The kind of support received this far has been reassuring and raises our hopes that even when implementing the plan, we shall get the required support at all levels.

We would also like to thank our various co-operating partners for the support they gave us throughout the process by funding most of the activities directly and through BESSIP. The nature of consultations that took place required considerable financial investments that would otherwise have been extremely difficult for the Ministry to meet completely from its own resources. We are grateful to those co-operating partners that either seconded personnel or agreed to use their resources to hire consultants to assist the Ministry in this important assignment. In particular we pay tribute to those advisers and programme officers from embassies and agencies who participated in the Strategic Planning Secretariat, for their commitment, warmth of spirit, and preparedness to give all they could emotionally and intellectually to the children of this country. Again, we say thank you for identifying with us and sharing in our aspirations. We also pay special tribute to all those who have been involved in the development of this plan in one-way or the other.

**B Y Chilangwa (Mrs.)**  
**Permanent Secretary,**  
**MINISTRY OF EDUCATION**

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## Acronyms

- AIDS Acquired Immune Deficiency Syndrome
- APU Academic Production Units
- BECF Basic Education Curriculum Framework
- BESSIP Basic Education Sub-Sector Investment Programme
- CBU Copperbelt University
- CPD Continuous Professional Development
- CSEN Children with Special Educational Needs
- DEB District Education Board
- DEBS District Education Board Secretary
- DESO District Education Standards Office/Officer
- DSF Designated Support Fund
- DSSF Direct Sector Support Fund
- EB Education Board (e.g. for high schools/colleges)
- ECCED Early Childhood Care, Education and Development
- EFA Education for All
- EMIS Educational Management Information System
- GDP Gross Domestic Product
- GER Gross Enrolment Ratio
- HIPC Highly Indebted Poor Country
- HIV Human Immunodeficiency Virus
- HRAD Human Resources and Administration Directorate
- ICT Information Communication Technology
- IFMIS Integrated Financial Management Information System
- MEPSU Ministry of Education Purchasing and Supplies Unit
- MoE Ministry of Education
- MoFNP Ministry of Finance and National Planning
- NER Net Enrolment Ratio
- NGOs Non-governmental organisations
- NIF National Implementation Framework
- NISTCOL National In-Service College
- OSF Other Support Fund
- PEO Provincial Education Office/Officer
- PRSP Poverty Reduction Strategy Paper
- PSRP Public Service Reform Programme
- PTA Parent Teachers' Association
- SHN School Health and Nutrition
- TEVETA Technical Education, Vocational and Entrepreneurship Authority
- TRC Teachers' Resource Centre
- TTCs Teacher Training Colleges
- UNZA University of Zambia
- ZATEC Zambia Teacher Education Course

## 2 Strategic Plan Context

### 2.1 Introduction

Zambia's national education policy document, '*Educating our Future*' 1996 laid down a clear vision for reforms of the whole education sector in line with changing international, national and individual needs. However, no practical strategies and implementation plans were developed initially to realise the vision, while poverty in Zambia increased and equitable access to education diminished.

The major challenges for education in Zambia are articulated in detail in the document '*Education in Zambia 2002*' which sets the overall context for this Strategic Plan. They include :

- the achievement of Universal Basic Education for Grades 1-9;
- improvement in progression rates from Grades 7 to 8 and from Grades 9 to 10;
- increase in retention and completion rates for Grades 1 – 9;
- improved access to high school and tertiary education, particularly for the poor, girls and children with special needs;
- adequate supplies of trained and motivated teachers and lecturers for all levels;
- reform of the curriculum at basic, high school and tertiary levels to provide relevant skills and knowledge; sufficient learning/teaching materials for all levels;
- effective decentralisation of education delivery; management/mitigation of HIV/AIDS;
- an increase in budgetary allocation to the education sector.

In the absence of a sector-wide plan, the Ministry of Education (MoE) initiated the Basic Education Sub-Sector Investment Programme (BESSIP) in 1999 in collaboration with its development partners. It provided for a variety of funding and technical support mechanisms, although the Ministry's preferred option was pooled budgetary funding. The strength of BESSIP is that it tackled the immediate issue of access and equity in basic education from Grades 1-7, and developed a model for Zambian ownership and more effective, co-ordinated support from international development agencies.

However, the emphasis on basic education meant that similar reforms needed in high school and tertiary education have not been fully implemented. In addition, it is generally recognised that expanding basic education enrolment increases demand for the next level, while even a slow-developing economy requires the higher order skills provided by post-basic education. The latter also provides the skills and competencies necessary for self-employment and enterprise, thereby contributing to economic growth and poverty reduction. Furthermore, any gains in gender equity, quality and decentralisation have to be sustained throughout the whole system.

### 2.2 Vision and Goals

The vision and goals have been structured into four main themes which are reflected throughout the basic, high school, tertiary sub-sectors, and administrative services :

#### **Vision Statement**

Quality lifelong education for all, which is accessible, inclusive, equitable and relevant to individual, national, global needs and value systems.



## Overall Sector Goals

<b>Access/Equity</b>	1. Equitable access to education at all levels through formal and alternative modes of delivery in partnership with key stakeholders.
<b>Quality</b>	2. Quality and relevant education, which enhances knowledge, skills, attitudes, values and lifelong learning.
<b>Administration, Financing and Management</b>	3. An improved policy formulation, planning and information management environment. 4. A sufficient, skilled and motivated human resource for the education system. 5. A properly financed, professionally managed, accountable and cost-effective decentralised education delivery system.
<b>HIV/AIDS</b>	6. An education system that counters the HIV/AIDS pandemic and manages its impact on education delivery, poverty and gender inequity.

### 2.3 Strategic Priorities

This Strategic Plan, therefore, will address all the sub-sectors of education but strive to remain realistic within the constraints of capacity, finance and time-scale. The main priorities will be:

- improved access, gender equity and quality in basic education (Grades 1-9);
- improved quality and efficiency in high school and tertiary education;
- development of relevant skills and enhanced learning achievement by all learners;
- effective decentralisation of decision-making, procurement and financial management to districts and schools;
- management/mitigation of the impact of HIV/AIDS.

From 2003-2005, the emphasis will be largely on Grades 1-9, particularly expansion of enrolment to grades 8 and 9. This has implications for teacher supply, and so teacher education will also be prioritised at the same time. During this period, a number of reviews and studies will be carried out into high school and university education reforms, particularly in terms of improving access, quality and cost-efficiency. Some rehabilitation of high school and university infrastructure will be undertaken in addition to the expansion programme institutions and communities have already embarked on. However major investment and reforms in post-basic education will begin from 2005. This is against a background of virtually no capital investments in high school and tertiary institutions in the past 10 years.

In addition, remote and disadvantaged areas will be specifically targeted for additional resource allocation, teacher deployment, and construction or rehabilitation of infrastructure. An analysis of districts will be undertaken to identify those districts and zones that need special targeting for education provision. Alongside this focus a number of strategies will be adopted to target out-of-school children, particularly orphans and vulnerable groups.

Early Childhood Care Education and Development will be introduced as a major new programme because of its impact on quality in basic schools. The programme will be introduced gradually from 2004 onwards and will target rural schools. Similarly, adult literacy programmes, which impact on parents' support to children's education will be developed gradually from 2004 onwards. School health and nutrition programmes will be expanded to link in with ECCED in terms of quality impact and readiness to learn.

The Ministry is aiming to increase enrolments for Grades 1 to 7 by 20% during the period 2002 to 2007 from the baseline of 1,921,014 in 2002 to 2,302,386 in 2007. The Upper Basic enrolment (grades 8 and 9) will also be increased by 49% from the baseline of 219,024 to 325,581 in 2007. High School will also be increased by 53% from 135,979 to 207,843 in 2007. Teacher training on the other hand will remain constant largely because of the current college expansion programmes and focus on quality. Pre-service student enrolments remain constant at 11,683. University enrolments will be increased by 35% percent from 8,965 pupils to 12,103.

The Plan is structured as follows. The **Strategic Context** contains the introduction, the overall vision and goals, and policy, social, economic, and institutional contexts. **Strategic Programmes** includes goals, strategies, and related work programmes of basic, high school, tertiary sub-sectors, administrative and support services,. Finally, **Financing of Strategic Programmes**, outlines the cost projections and targets.

## 2.4 Policy Context

### 1.4.1 Poverty Reduction

In the Poverty Reduction Strategy Paper, the government states clearly that health and education sectors are among the top priorities along with addressing the HIV/AIDS pandemic. It recognises that with the collapse of the traditional social security system of the extended family, state-funded safety nets need to be managed and supported financially. However it asserts that this calls for better targeting of the poor and most vulnerable people, and improved tools for identifying these groups. In addition, the PRSP prioritises agriculture, tourism and diversification from mining into small and medium scale businesses and industries as the main engines of economic revival. This has implications for the kinds of skills and competencies that formal and informal education and training needs to inculcate in order to contribute to poverty reduction. The Strategic Plan has absorbed all the major PRSP education strategies and targets into its goals and objectives but extended the timeframe to 5 years.

These targets include extending basic education to grades 8 and 9 by converting all middle basic schools into full basic education institutions, renewing emphasis on equity issues including abolition of school fees and uniforms, and providing greater support to girls' education, HIV/AIDS orphans and children with special needs. The Strategic Plan also addresses the key manifestations of poverty in the education system in terms of improving completion rates, learning achievement, pupil and teacher attendance, health and nutrition, and overall quality.

The quality and relevance of high school and tertiary education will both be improved in terms of knowledge and skills development. The High School curriculum will be reviewed to make it more relevant and responsive, and to enable graduates to acquire high-level skills. In addition, stronger linkages will be developed between life skills, practical subjects in basic and high schools and the skills training provided by institutions registered with the Technical Education, Vocational and Entrepreneurship Authority (TEVETA).

Distance education and other modes of open learning will be improved and expanded to capture more of the out-of-school population, while early childhood education and adult literacy programmes will be revitalised, particularly for rural communities.

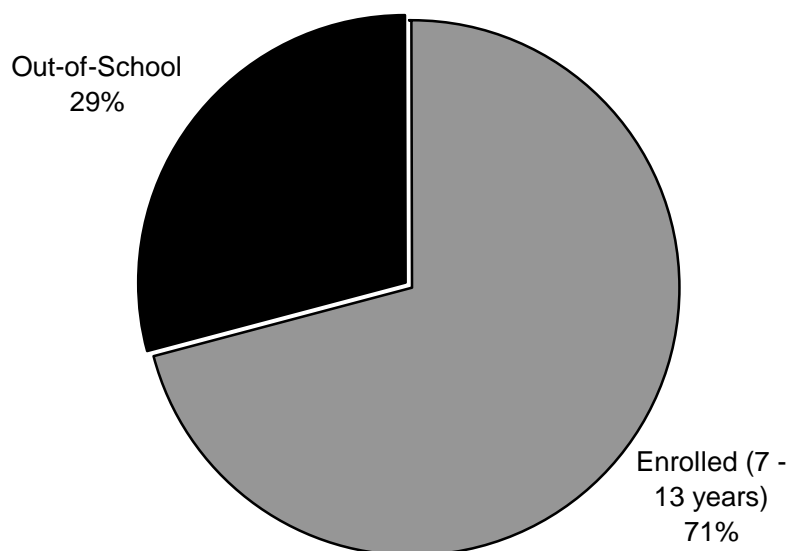
#### 1.4.2 Free Basic Education (Grades 1-7)

The Free Middle Basic Education policy (Grades 1-7) was announced in February 2002 by the President of the Republic. This was followed up by a circular to all schools and education offices explaining what Free Basic Education entails. All user fees have been abolished from Grades 1-7 and uniforms are not compulsory. Education Boards and PTAs may raise funds through various activities, but no child can be denied access to school on account of costs.

The policy will be backed up by the following measures: sensitisation of communities about the importance of educating girls, women, orphans and the vulnerable; distribution of grants to all government and recognised community schools based on unit cost, learner population and equity-based criteria; provision of infrastructure and learning materials ; bursaries for orphans and children with special needs for basic essentials like clothing, and weekly boarding facilities for those without adequate home-based care.

These measures are likely to bring about a substantial increase in enrolment in basic schools to reduce the percentage of out-of-school children shown in figure 1. However, they also have strong financial implications for the government. The Annual School Census for the period from 2001 to 2002, including the declaration of Free Middle Basic Education , indicated a significant growth of 7% in pupil enrolment. This is in sharp contrast to previous trends when enrolments were increasing at lower than 2% every year.

Figure 1 Percentage of Out-of-School Children in the Age Group 7 – 13 (2001)



Source: CSO; Ministry of Education, Planning Unit; ZCSS

Despite the inequity it caused, cost sharing by parents did create participation in their children’s education. Communities will therefore be encouraged to maintain strong involvement in schools through development of ‘social contracts’ detailing the different

support mechanisms. In addition, cost sharing will still be required in Grades 8 and 9, 10-12 and at tertiary level.

### **1.4.3 Orphans and Out-of-School Children**

Despite the introduction of free basic education for Grades 1-7, a number of children, particularly orphans, may not enrol in the government system for a variety of reasons. Specific strategies will be implemented to address this challenge, including bursaries for basic clothing and school materials along with weekly boarding facilities. In addition, the Ministry will set up a task force in conjunction with the Ministry of Community Development and Social Services, Ministry of Youth, Sports and Child Development, Ministry of Health, NGOs, religious organisations and co-operating partners to develop a variety of informal and alternative approaches to reaching these children.

#### *Community Schools and Interactive Radio Centres*

The Ministry recognizes that over the last four years two kinds of successful alternative approaches that address enrolment of orphans and vulnerable groups have already been established. Therefore new agreements and memoranda of understanding will be developed with community schools and interactive radio centres to provide specific access for out-of-school children. These agreements will increase Ministry support through grants and materials while still preserving strong community ownership.

Due to the large expansion of community schools, it is important to establish quality control measures through standards officers, leading to formal registration with the Ministry before these institutions are provided with government support. This process may also result in the best community schools becoming grant-aided schools. Conversely some community schools may become redundant as removal of fees encourages pupils to return to the government system. The interactive radio centres are also transitional structures pending adequate government provision, but should be monitored for consistency. However radio programmes will continue to be used in the long-term to supplement learning and teaching in regular schools.

### **1.4.4 Access to High School Education**

Recent studies have revealed that secondary education increases chances of formal sector employment or of acquiring skills and competencies for informal sector work. Employers often prefer those with successful general secondary education in terms of 'trainability' while secondary school leavers are more likely to have higher average earnings than those that have completed primary education. Gender inequity is still more marked in secondary school, and yet further schooling influences factors such as improved family health, nutrition and family planning. However, there is a need to improve both the relevance and efficiency of high school education.

A number of cost-efficiency measures are described under Financing of Education that will contribute to increased access to high school, including single-shifting where pupil-teacher ratios allow, better utilisation of teachers, and increase in classroom space when Grades 8 and 9 classes are moved to basic schools. A comprehensive sub-sector review will be carried out in 2003 particularly on increasing access, equity, quality and efficiency. The curriculum will be reviewed to strengthen the linkages between high schools, skills training centres under TEVETA and higher education institutions.

#### *Academic Production Units*

The system of Academic Production Units in Grades 8 to 12 in some schools, where private tuition fees are paid and special classes conducted, has been criticised for its management and accountability, but it widens access and raises revenue for schools. In future, once the intake of eligible pupils has been completed, each school will be allowed to enrol pupils who did not make the examination grade, according to the classroom space available. The revenue will be collected and used by each Education Board according to standard guidelines that will be revised and administered by the Directorate of Planning and Information. The finances will be monitored and audited by Provincial Education Offices to ensure that procedures are followed.

#### **1.4.5 Universities**

Although the universities are autonomous institutions, the Ministry is responsible for providing bursaries for students and grants towards upkeep of those institutions. While improved access and quality is targeted, the universities will need to implement wide-ranging reforms and restructuring to reduce the accumulated debts and turn the institutions into efficiently administered entities that are effectively engaged in capacity building, the development agenda, and poverty reduction strategies. This will involve much greater engagement in human resource planning, review of course structures and content through dialogue with government, civil society and private sector, and review of staff remuneration packages. Communications between the Ministry and the universities will be strengthened by establishing a Higher Education liaison officer in the Directorate of Standards and Curriculum Development, and involvement of top university management in the Ministry senior management meetings.

#### **1.4.6 Open and Distance Learning**

The opportunities that this mode of access can provide has not been fully realised in the past, with only about 600 students catered for by the University of Zambia, and less than 5,000 students enrolled under the Department of Continuing Education in the Ministry of Education. The training of open learning tutors has been neglected along with provision of appropriate materials, equipment and infrastructure. Under the new Directorate of Distance Education, there will be a complete overhaul of open and distance-learning provision, including training of tutors, production of quality learning materials, and streamlined management and co-ordination. The National Correspondence College will be restructured and financed to improve the overall quality of delivery, and increased use made of information and communications technology, particularly radio, to enhance learning.

Stronger linkages will be established with the universities and other distance learning institutions, and successful programmes like the Distance Diploma in Primary Education expanded and updated. The network of Teacher Resource Centres in the country will be fully utilised for certain levels of distance education, along with the high schools that are currently used as open learning centres. The Interactive Radio Initiative will also be developed, so that programmes can support key issues like HIV/AIDS and reach regular schools as well as the IRI centres.

#### **1.4.7 Special Programmes**

BESSIP has introduced a number of innovative, crosscutting programmes that will be incorporated into the new Ministry structures, strengthened and expanded. These include HIV/AIDS, School Health and Nutrition, Special Educational Needs, and Gender and Equity, with a particular emphasis on girls' education.

*HIV/AIDS*

The greatest challenge remains the management and mitigation of the effect of HIV/AIDS on the teaching force in particular, but also on pupils, support workers and education officials throughout the country. Teacher attrition rates have been quoted as high as 1,600 basic education teachers lost to the system each year. This negates recent efforts to improve teacher output and redeployment.

The Ministry of Education has developed a comprehensive HIV/AIDS strategy under BESSIP which will be scaled up. Activities under this programme will include advocacy and sensitisation campaigns, development of workplace policies to provide counselling and protection to all in education institutions, and planning based on impact studies, particularly for the replacement of sick and absent teachers.

#### *School Health and Nutrition*

Specific initiatives have already been trialled under BESSIP, particularly nutrient supplementation. However, there is a strong connection here with the development of sustainable food security in the country as a whole. Therefore in addition to widening the current programme, the Ministry will encourage the expansion of agricultural production units at basic, high schools and colleges that will supplement the diet of pupils and students, as well as developing livelihood skills. In addition, through PTAs and Education Boards, parents will be sensitised to contribute to their children's education by ensuring they do not go to school hungry. Partnerships with the World Food Programme and other organisations will also be strengthened to ensure that targeted vulnerable school communities, particularly during periods of drought, are supported through carefully designed school feeding programmes.

#### *Special Educational Needs*

A number of inclusive schooling initiatives will be expanded, including training of more teachers at Zambia Institute of Special Education (ZAMISE), identification and assessment of special needs pupils, and provision of specialist materials and equipment. Schools will be given incentives in the form of additional grants and/or bursaries to enrol more children with special needs from the local communities.

#### *Gender and Equity - Girls' Education*

There will be a continuation of initiatives aimed at increasing participation by girls in basic and high school education. Despite improvements in overall enrolment, there are still alarming dropout rates in grades 7 and 9. The rates are attributed to early marriage, pregnancies or simply demand for girls to assist with looking after the family. With boys too, poverty levels often force parents to take them out of school to assist with fishing, farming or small family businesses. Initiatives will include more effective sensitisation of traditional leaders, communities and parents, targeted grants and bursaries, and adjustment of school timetable and term dates to fit in with seasonal work activities. Visible improvement in literacy and numeracy also seems to encourage parents to keep both sexes in school, consequently, innovative programmes like the Primary (Middle Basic) Reading Programme will be strengthened and expanded.

### **1.4.6 Quality and Relevance**

#### *Literacy and Numeracy*

Under BESSIP, a major success story has been the Primary (Middle Basic) Reading Programme which tackles initial literacy in Zambian languages before developing the same oral, reading and writing skills in English. The programme also enhances other skills and is

sustained throughout the 7 years of middle basic education. A similar programme in numeracy is also required in order to ensure a more comprehensive improvement in learning achievement levels in basic education.

#### *Life Skills and Skills Development*

The Basic Education Curriculum Framework has already introduced a number of life skills as an integral part of each subject and cross-curricular theme in basic education. The Framework defines different sets of life skills: intellectual skills (e.g. reading, deduction, analysis); learning skills (e.g. independent study); social life skills (e.g. handling peer pressure, communication); psychological life skills (e.g. handling personal problems); psychomotor skills (e.g. using hands/body skilfully); and, practical life skills (e.g. using tools, selling goods/services). HIV/AIDS issues link in very strongly with psychosocial life skills.

In terms of practical subjects, which are related to practical life skills, the basic curriculum now includes information technology, art and design, industrial arts, construction and maintenance from Grades 5-7. The syllabi for all these additional topics/subjects are being developed and will be reviewed and revised where necessary. In addition, the Curriculum Framework will be extended to Grades 8 and 9.

In reviewing the curriculum for High Schools, the Ministry of Education will co-ordinate with the Ministry of Science, Technology and Vocational Training and TEVETA to ensure that any pre-vocational or practical skills programmes introduced into high schools are part of a general vocational qualifications framework that links up with the Skills Training Centres and colleges providing professional courses. The high school curriculum will also build on the life skills programme introduced in basic education, including information technology and appropriate psychosocial life skills such as HIV/AIDS, human rights and governance issues. In turn, all teacher education institutions will include life skills and the relevant practical subjects in their curricula.

#### **1.4.7 Early Childhood Care, Education and Development**

The lack of preparation through pre-school is a contributory factor to under-achievement especially by rural children and the poor in basic schools. The Ministry of Education will work closely with Ministry of Local Government and in particular with the Pre-School Association of Zambia, district councils, religious organisations, NGOs and the private sector to set up a number of pre-school classes in existing rural and semi-urban basic schools.

In line with Education for All (EFA) commitments and PRSP, Zambia will expand activities for young children, 0-5 years old, with emphasis on community based interventions. In addition, Early Childhood Care, Education and Development (ECCED) will become part of basic education, which will make it easier for basic schools to host programmes in this sub-sector and hence increase access for many rural children, particularly from marginalized communities. In order to provide quality assurance, the Ministry will further expand the training of teachers in this sub-sector.

#### **1.4.8 Adult Literacy**

Another significant factor affecting attendance of children and poverty reduction, is the level of parents' education. Adult literacy and adult basic education has lacked co-ordination and funding for materials, tutor training and learner support. Therefore, the Ministry of Education will work closely with the Ministry of Community Development and Social Services, the Adult Education Association of Zambia, non-governmental organisations, religious organisations and UNZA to implement a gradual improvement in adult literacy provision. A representative task force from these stakeholders will be set up to review all

the current initiatives, analyse strengths and weaknesses, and co-ordinate the development of a programme, in conjunction with the Directorate of Distance Education, to establish adult literacy centres in education zones according to demand.

The adult literacy programme will revamp the low national literacy levels, and increase access to adult literacy by all marginalized groups. The quality of literacy programmes will be improved, and the capacity of providers will be enhanced. Equally, communities will be sensitised to demand access to literacy programmes. In addition, opportunities will be created for literacy graduates to continue learning through distance education modes such as Interactive Radio Instruction (IRI) and Community Schools.

#### **1.4.9 Teachers' Pay and Conditions**

The Ministry recognizes the crucial role that teachers and lecturers play in the education system and the importance of developing a strong and sufficient professional cadre through proper pay scales and incentives. It will work with Ministry of Finance and National Planning and teachers' unions to review pay and conditions regularly within the context of overall pay reform and within the constraints of economic growth. More attention will be paid to non-salary benefits such as housing allowances, rural hardship incentives, promotions, and access to further staff development and upgrading opportunities. In connection with the latter, Teachers' Resource Centres will be developed as effective distance learning centres in addition to their current roles.

#### **1.4.10 Partnerships in Education**

The Ministry has already been working with civil society and specific non-governmental organisations in developing the Education Chapter of the PRSP, the Strategic Plan, and in implementing activities in HIV/AIDS, Gender and Equity and School Health and Nutrition. These partnerships will continue to be formalised through contracts and memoranda of understanding, such as in the case of Community Schools. In addition, there will be a strengthening of the long-standing relationship with religious organisations who still have major influence in the running of a number of high schools in particular. Similarly, the private sector plays a major role in provision of basic, high school and college education and this will be encouraged further. An officer in the Standards and Curriculum Development Directorate will be appointed to liaise with the various bodies and groups with specific interest in education.

### **2.5 Economic Context**

The economic prospects for Zambia seemed good in 1991. However, despite the government's implementation of a substantial donor supported programme of liberalisation and market based reforms, the economic performance of the early 1990's continued Zambia's record of low and uneven growth. Per capita incomes and living standards continued to fall. Human development indicators reveal that poverty and social indicators worsened. Zambia's growth started to improve in the mid 1990s, averaging 3.2% over the last seven years (1996-2002) despite a sharp fall in copper production in this period, and this marks a gradual improvement from decades of decline. But sustained and even growth has remained elusive, principally due to failed privatisation of parastatals, especially in the copper sector, the vulnerability of agricultural production to climatic changes and a 'stop-go' approach to aid flows from donors reflecting various disputes and concerns about growing corruption under the previous administration. The privatisation of Zambia Consolidated Copper Mines in 2000 was a catalyst for Zambia's passing the Decision Point under the Enhanced HIPC Initiative in December 2000. Without HIPC, Zambia's current debt service



from 2001-2005 would have been excessive, (\$430m per year arising from payments due to the IMF for their substantial lending programmes during the 1990s). Hence reaching Completion Point under HIPC and maintaining macroeconomic stability are crucial elements underlying Zambia's PRSP. The broad economic stability and growth witnessed during the last two to three years is promising in this respect.

Although the improvement in economic performance since the mid 1990s has been significant when seen in the context of previous long-term stagnation, it has not yet been sufficient to overcome three core economic challenges. Firstly there is the legacy of chronic and persistent external and fiscal deficits which underpin the problem of Zambia's debt burden. Secondly Zambia's overall economic progress is still vulnerable to the erratic performance of the copper and agricultural sectors. Thirdly the structural weaknesses, which have prevented sustained and vigorous private sector led growth still remain. Recent developments include rapidly increasing imports of investment goods to the mining and tourism sectors. Mining exports picked up after privatisation of the mines, but the improvement, in both production and prices, has been well below expectations at the time. Non-traditional exports, which have more than doubled in the last decade, and tourism are picking up again and remain the bright spots. Under the current PRGF (Poverty Reduction Growth Facility), Zambia has also established a degree of fiscal control sufficient to prevent a re-emergence of the extremely high inflation witnessed at various times in the 1990s, but has yet to get a firm and lasting grip on government expenditure. The failure to establish a fully credible medium term fiscal plan has also precluded full stabilisation, with inflation remaining persistently above 20%, giving Zambia one of the worst inflation records in Africa.

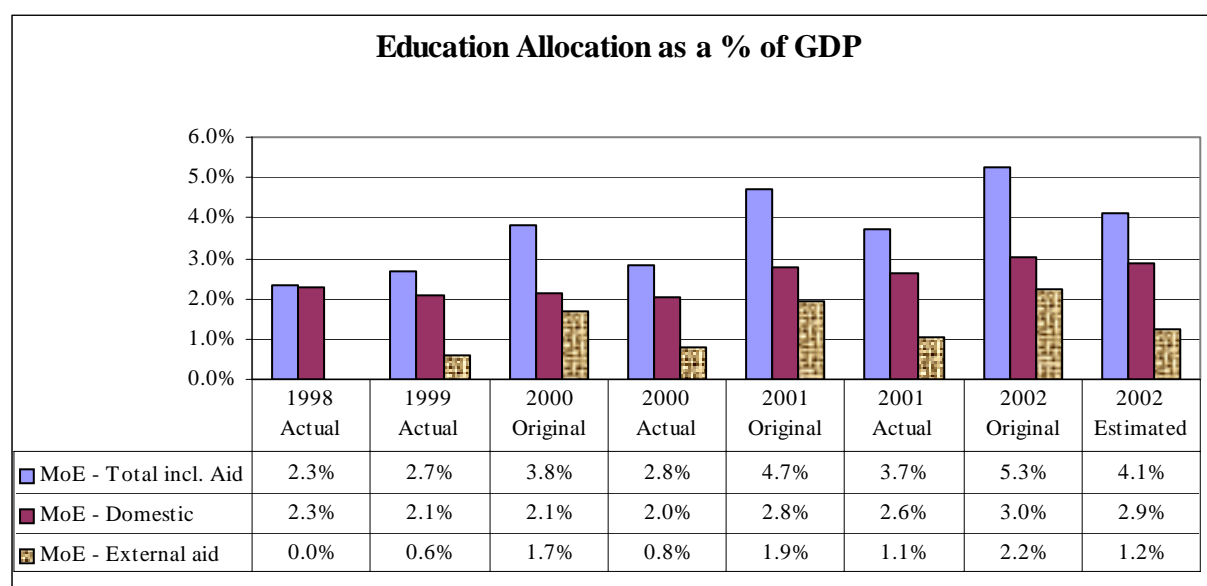
These two sectors of copper and agriculture remain the critical loci for Zambia's economic and social vulnerability and they are again threatening to undermine economic progress. The fall in the copper price from mid 2001 precipitated Anglo American's exit from Zambia's main copper producer, Konkola Copper Mines (KCM). KCM has been restructured and copper production remained robust in 2002, but the potential crisis highlighted Zambia's excessive dependence on and vulnerability to copper yet again. In the medium to longer term a substantial diversification effort will be required to set Zambia's external situation on a sustainable footing. Furthermore, Zambia is again facing a food shortage, a regional problem, having suffered from two years of adverse weather conditions. Maize production for the 2002 season has been just half the average of the last five years and Zambia's agricultural sector, and the nutritional requirements of the poor, remains excessively dependent on maize.

The PRSP acknowledges the need for a realistically gradual approach to poverty reduction given the pervasive problems and constraints facing Zambia. First, while the debt relief arrangements will, in practical terms, mean avoidance of a sharply increased debt repayment schedule over the next few years, it does not mean reduced repayments from one year to the next. Secondly, in order to transfer resources from one part of the budget to another the government needs to address a raft of underlying problems in current resource allocation which have been building over successive recurrent budgets. A wide-ranging reform effort in public expenditure management will be required to unwind these commitments over time and free up resources for pro-poor purposes. Similarly wide ranging efforts will be required to establish a diversified private sector, which can move beyond dependence on copper and subsistence agriculture. Zambia has, however, qualified for a Poverty Reduction Growth Facility of \$300 million from the IMF when the Poverty Reduction Strategy Paper was approved in May 2002.

### 1.5.1 Budgetary Allocations to Education

The budget allocation to education in Zambia is the lowest in the sub-region. Just over 20% of the total disposable budget was allocated to education in 2001, compared to 25% - 30% in other countries in the sub-region. Over the past five years the education budget has remained at just over 2% of GDP compared to 5% - 6% in neighbouring countries. In 2001, the education sector received 21% of the HIPC resources, which accounted for 10% of the education budget. The achievement of the targets put forward in this plan would necessitate a significant increase to finance the recurrent expenditure alone. The additional funds currently targeted for education under the PRSP would increase the budget by 12%.

**Figure 2 Education Allocation as a % of GDP**



As noted in the figure above, allocation to education from government's own resources has been oscillating between 2.0% and 3.0% during the period 1998 to 2002. On the overall, education allocation as a proportion of GDP has increased from the actual of 2.3% to an estimated actual of 4.1% in 2002 (this includes external funding). There have been very minor variations between actual budget expenditure and the original budget for domestic resources while actual expenditure under external financing show appreciable disparities between actual expenditure and original budget.

### 1.5.2 Efficiency Measures, Cost-Sharing and Partnerships with the Private Sector

The prospects for cost sharing cost-recovery are limited due to high poverty levels in the country. However, greater efficiency measures can be introduced in upper basic, high school and tertiary institutions through better utilisation of teaching staff, reduced unit costs in construction and learning materials, and improved school planning and management.

There exists potential for partnerships with the private sector in both high school and tertiary education through leasing of land, encouragement for local companies to invest in educational facilities, tax incentives, voucher schemes, teacher provision and flexible but consistent regulatory frameworks.

Relationships with traditional partners such as religious institutions in terms of grant-aided schools will also be strengthened. Nevertheless, the financing gap is such that the government will continue to need assistance from international development agencies.

## **2.6 Institutional Context**

The Ministry of Education is currently carrying out its restructuring process in the context of broader Public Service and Governance reforms. Under the Public Service Reform Programme (PSRP), a number of reforms are projected in terms of wage policy and employment; payroll management and establishment control; financial management system implementation; anti-corruption programmes and local government. Additionally, the Ministry will within the broadly accepted framework adjust its organisation structures, systems and procedures based on the demands of the time in order to enhance organisational effectiveness. The government has also declared a strong stance against corruption, particularly within the government structures in terms of financial management and procurement. It is notable that the Ministry of Education has been selected to pilot the Integrated Financial Management Information System (IFMIS) and the World Bank-initiated Public Expenditure Tracking System (PETS) due to its relatively strong track record.

### **1.6.1 Change Management**

The restructured Ministry of Education will consist of five Directorates, which are described in greater detail under Administrative Services. BESSIP will be absorbed into the line functions of the new Directorates as well as the High School and Tertiary Education Sub-sectors. Major capacity building programmes, including change management, will be introduced to enhance commitment to teamwork, information dissemination and public relations. In addition, there will be a strong focus on improved planning, financial management, data collection and operational systems, which will be supported by increased use of information technology.

### **1.6.2 Decentralisation and Education Boards**

Decentralisation of the education system has led to the creation of District Education Boards, High School and College Education Boards, which will manage education delivery at these levels. This Plan will be implemented largely by decentralised delivery of education services through these Education Boards using a quarterly cycle of grants disbursement and accounting procedures. These grants will be based on resource allocation criteria that will take account of the particular needs of remote rural areas. A district basket fund will be set up to facilitate the process and the whole system will be supervised and monitored by the Education Boards Services Section in the Planning and Information Directorate.

The operational structures at the district will be separated into the District Education Board (DEB) and the District Education Standards Office (DESO). The District Education Board will ensure education and education facilities are provided and that staffing and enrolment plans are in place. The District Education Standards Office will be responsible for monitoring and evaluating the performance of schools and the Education Boards themselves as per set standards. Clear guidelines have been developed for the Education Boards and it will be necessary for PTAs to be fully conversant with these guidelines to avoid misunderstandings.

With the establishment of Education Boards, the Provincial Education Office assumes a new dimension with emphasis on co-ordination of the implementation of district programmes and activities, monitoring and supervision of policy and standards, and ensuring accountability through audit procedures.

In 2003 major capacity-building programmes will be initiated, alongside deployment of qualified personnel, to ensure that planning, financial management and procurement responsibilities can be delegated successfully to provinces, districts and all education

boards. Particularly important will be the training of heads, principals and school management teams on all aspects of educational management in order to contribute to better school performance. Major sensitisation programmes will be undertaken to ensure that communities understand the importance of their role in the management, monitoring and accountability of education boards. Another area that will be improved is the communication between district offices and school communities.

### **1.6.3 Decentralisation of procurement of textbooks and learning materials**

Although the Ministry will decentralise procurement over the next three years, it recognises that institutional capacity at all levels will have to be strengthened first. Therefore, procurement of textbooks will be targeted for decentralisation first because there is already capacity at schools to identify and select their learning material needs. This process will be piloted first in two provinces during 2003-2004 before being extended to all provinces.

Education Materials Unit headed by a Principal Curriculum Specialist in the Directorate of Standards and Curriculum will be created to manage the planning tracking and monitoring of supply of education materials to schools in collaboration with the Purchasing and Supplies Unit. Basic Schools will be provided with budget ceilings, and District Education Boards, who will have purchasing authority, will compile school orders and send them to suppliers for delivery to districts. High Schools and Colleges, on the other hand, will deal direct with suppliers and have both budget ceilings and purchasing authority. In addition the National Book Policy will be revised and updated, and strategies developed with the Zambian book industry to strengthen the competitiveness and distribution capacity of publishers and booksellers, in order to reduce the costs of education materials.

## **2.7 Research and Studies**

Several strategies in this Strategic Plan will require further research and studies to be carried out, before final implementation plans can be drawn up. These will include studies on enrolment of orphans and vulnerable children (following the free Middle Basic education announcement), early childhood development, adult literacy provision, girls' education, and high school curriculum / assessment with reference to life skills. In addition, research will be initiated into cost-efficiency measures such as pupil-teacher contact hours at basic and high school level, low-cost construction, reduced textbook costs, and cost-recovery mechanisms, particularly for high schools and universities. Higher education will be targeted for analysis of its management, financing and quality in terms of graduate outputs and their suitability for the human resource needs of Zambia.

### 3 Strategic Programmes

The roles of the Ministry are as varied as the stakeholders it interacts with. In addition to providing support services to basic, high school and tertiary education, it works with the private sector, autonomous institutions and other line Ministries that deal with education and training. The mission statement below summarises how the Ministry will implement the strategic programmes that follow.

#### **Mission Statement**

The Mission of the Ministry of Education is to enable and provide an education system that will meet the needs of Zambia and its people.

This will be achieved by:

- a) Developing and co-ordinating the policy, funding, planning and delivery of quality basic, high school and teacher education, in consultation with stakeholders and in partnership with other providers;
- b) Providing efficient professional and administrative support services based on reliable information management systems;
- c) Ensuring that education infrastructure is of acceptable standards and that there are adequate and relevant teaching and learning materials;
- d) Providing and sustaining professional, qualified and motivated human resources;
- e) Monitoring and evaluating educational standards;
- f) Establishing mechanisms for the development of policy direction with autonomous institutions, particularly in the field of tertiary education and, where appropriate, the management of their funding allocation;
- g) Working with other line Ministries and government institutions in coordinating policy, strategy and implementation of educational services provided by government.

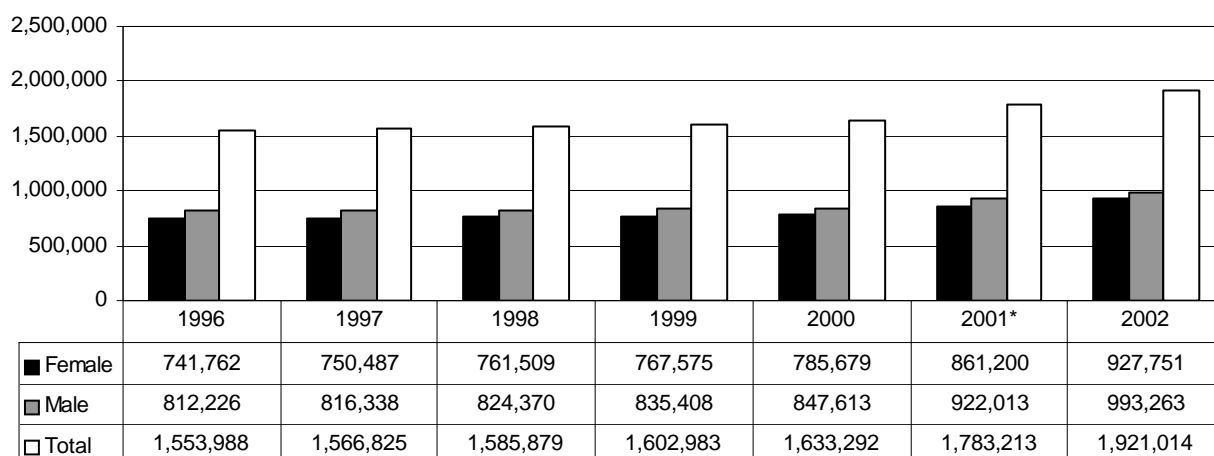
### 3.1 Basic Education

#### 2.1.1 Situational Analysis

Many gains have been achieved for lower and middle basic education through BESSIP. These include higher enrolment rates, construction and rehabilitation of more classrooms and an increase in the number of teachers. Despite these gains, the Basic Education Sub-sector is still faced with many challenges in the years ahead. The number of schools offering basic education was 6,459 of which 4,271 are government, 65 Grant Aided, 198 private and 1,149 community schools. 85.6% of the government schools are in rural areas. In 2001, roughly 1.77 million children were enrolled in grades 1 – 7. It was estimated that 30% of children in the school-going age were not enrolled, which translated into nearly 620,000 children. The problem was particularly high in the rural areas and for children aged 7 with over 55% in that age group not enrolled. There was relative gender parity in grades 1 – 7, although the figures show that it decreases in the last years of middle basic.

Community Schools have grown in number considerably from 38 in 1996 to 1,149 in 2001 and enrolment has increased from 6,600 in 1996 to over 140,000 in 2001. In addition, the Interactive Radio Initiative (IRI) is beginning to enrol more and more pupils.

**Figure 3 Enrolment Trends by for Grades 1 – 7 by Gender (1996 - 2002)**



Source: Ministry of Education - Planning Unit, EBS, ZCSS (\*includes figures from Community Schools and IRI Programme)

While school places do exist in the rural areas, the problem has been exacerbated by a lack of teachers and the poor conditions of the existing classrooms. In 2002, there were 36,257 teachers in government basic schools, while 872 taught in Grant Aided basic schools and 3,355 in Private basic schools. Over 25% of the existing classrooms were in temporal structures or in poor condition. The Ministry is faced with two main challenges in teacher education. While it is necessary to produce more teachers, it will be equally important to re-deploy existing teachers to the rural areas. In some rural areas the pupil: teacher ratio is double that of the urban centres.

The situation is even more critical for grades 8 – 9. The enrolment rates for grades 8 – 9 are approximately 190,000 of which girls represent 46% of the total. These figures include the Academic Production Units (APU). Presently only half of the pupils leaving grade 7 are

able to find school places in grade 8, while just over one-fourth leaving grade 9 are proceeding to Grade 10.

The quality of education has been compromised by various factors. The overloaded and compartmentalised curriculum, coupled with dismal pupil teacher contact time has been one factor, while the lack of sufficient educational materials has also contributed to the low quality of education. Learning achievement remains at low levels, mean scores in English and Maths in Grade 5 at 33% and 34% respectively. The HIV/AIDS pandemic has also had a devastating impact on the educational system. The loss of teachers through death and sickness has greatly reduced the pupil: teacher contact hours in the schools.

With regard to the infrastructure facilities for schools, if double shifting were limited to lower basic, and all temporary classrooms were rejected for use, at present there would be a shortfall of about 400,000 school places, which translates into 8,500 classrooms. Further, there is a backlog in the provision of teachers' houses of about 600 units. 60% of the current stock of 21,000 classrooms and 70% of the 12,000 teachers' houses needs to be rehabilitated, 20% of the classrooms and 30% of the houses have major defects.

### 2.1.2 Sub-sector Goals

THEME	WORK PROGRAMMES	SUB-SECTOR GOAL
<b>Access/Equity</b>	<i>Policy and Planning</i> <i>Financial Management</i> <i>Procurement</i> <i>Infrastructure</i> <i>Distance Education</i>	1. Provide free basic education to all children that is responsive to girls, rural children, children with special educational needs, orphans and other vulnerable groups.
<b>Quality</b>	<i>Teacher Education</i> <i>Curriculum and Assessment</i> <i>Standards and Evaluation</i>	2. Increase learning achievement in literacy and numeracy 3. Co-ordinate the provision of early childhood education and adult literacy in collaboration with other key stakeholders
<b>Administration, Financing and Management</b>	<i>Policy and Planning</i> <i>Human Resource and Administration</i> <i>Institutional Development</i>	4. Strengthen the capacity of the District Education Boards and Schools to plan, cost, manage and monitor the delivery of education services.
<b>HIV/AIDS</b>	<i>Policy and Planning</i> <i>Special Issues</i>	5. Develop and support actions aimed at mitigating and reducing the impact of HIV/AIDS on Basic Schools.

*N.B. The specific objectives for each sub-sector can be found in the National Implementation Framework Summary in the Appendices*

## 2.1.3 Strategic Summary

### 2.1.3.1 Access/Equity

The main targets by 2007 will be improved enrolment rates, progression and completion rates matched by improved learning achievement levels from Grades 1-9 and moving towards the goal of Universal Basic Education. Specifically, the Ministry will attempt to achieve gross enrolment rates of 110% and completion rates of 86% for grades 1 – 7, whereas for Grades 8 – 9 gross enrolments rate target of 62% and completion rate of 59% have been set. The target for progression rate to Grade 8 is 70% by 2007, particularly for girls

To achieve these targets, the Ministry will allocate sufficient funds in terms of school grants to all basic government schools and recognised community schools to support the free basic education (Grades 1-7) policy. Special priority will be given to remote rural schools in terms of resource allocation and construction or rehabilitation of classrooms and teachers' houses as part of the overall national infrastructure programme. The Ministry will also work with community schools, interactive radio centres and other alternative modes to provide specific support to out-of-school children, including bursaries and weekly boarding facilities.

The current low progression rate to Grade 8 will be improved through gradual expansion of all basic schools to Grade 9, increased government funding, additional bursaries, community participation, and more efficient use of teachers and classroom space, including reduction and eventual elimination of double shifting. The Ministry will work towards reducing and abolishing user fees for Grades 8 and 9 over the next five years through further increases in budgetary allocations.

The issue of girls dropping out of school between Grades 5-7 and Grades 8-9 will be addressed by a vigorous grass-roots campaign with traditional leaders, parents, and civil society groups, supported by co-operating partners, to change attitudes and develop incentives for keeping girls in school.

The ministry aims at achieving the net admission rate of 100% by the year 2007 from 94% in 2002 with a gross enrolment target of 110% from 101%. The Ministry will further ensure that the completion rate at Grade 7 rises from 65% in 2002 to 86% in 2007. This would be achieved through a rigorous process of reducing repetition rates from 7% in 2002 to 4% in 2007. Further the Ministry is putting various interventions in place to ensure that pupils who enrol in school remain in school until the end of the cycle.

**Table 1 Enrolment Targets**

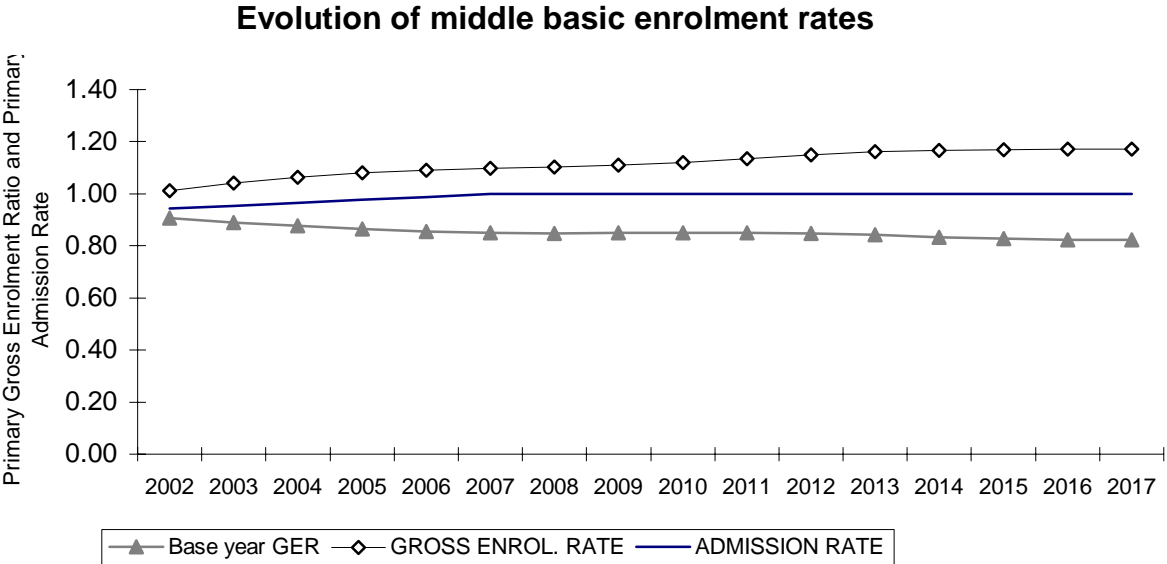
**Table P2: Target Access Indicators**

	<i>Base</i> 2001	<i>Estimate</i> 2002	2003	2004	<i>Projected</i>		
					2005	2006	2007
<b>Middle Basic (1-7)</b>							
Admission rate	95%	94%	95%	96%	98%	99%	100%
Gross enrolment rate	97%	101%	104%	106%	108%	109%	110%
Completion rate	64%	65%	69%	73%	76%	80%	86%
Repetition rates	6%	7%	6%	5%	5%	4%	4%
<b>Upper Basic (8-9)</b>							
Transition rates	53%	57%	59%	62%	64%	67%	70%
Gross enrolment rate	42%	46%	49%	52%	55%	59%	62%
Completion rate	41%	45%	47%	50%	53%	56%	59%
Repetition rates	6%	7%	7%	7%	6%	6%	6%



The Ministry of education sector plan though covering a period of 5 years from 2003 to 2007 shows the evolution for basic education enrolment of up to 2015. This is to reflect the longer term goal of the Ministry of Education as stated in *Educating Our Future*.

**Figure 4 Evolution of Middle Basic Enrolment rates**



**2.1.3.2 Teacher Requirements**

In 2002 there were a total of 37,933 teachers for Grades 1 – 7, of which 31,900 were in government schools, and 6,033 in private schools (including community schools). In 2003, it has been projected that there will be an increase of 6.5 percent personnel, and thereafter the Ministry will concentrate on replacing the teachers due to natural attrition. Additional efforts will be made to streamline the distribution of teachers to ensure maximum utilisation. While aiming at the elimination of the undesirable practicing of double shifting especially for lower Grades (1 to 4), in the long term, the Ministry will in the interim endeavour to sufficiently utilise the teachers in the system by maintaining double shifting for lower Grades in the interim period up to 2007 with the eventual aim of eliminating practice by 2015. If the current pupil: teacher ratio of 36.2 : 1 is maintained, and double shifting eliminated, the Ministry will need an addition of about 25,000 teachers by 2003.

There will also be major efforts to optimise the utilisation of classroom space. This will involve the raising of the pupil teacher ratio from 52 in 2002 to 64 in 2007. Effectively, the 43.3 percent of teachers who will be shifting, and receiving a double class allowance for overload, will take the place of about 16,000 teachers who should have otherwise been in the system if there would be no double shifting. Further, efforts will be made to increase the class size from 36 to 45. Taking into account the double shifting factor reduces the pupil:teacher ratio from 45. For Grades 8 to 9, efforts will be focussed on increasing enrolments and class size. This will result in the pupil: teacher ratios rising from 21 to 36 while class size will rise from 40 to 45. It is most likely that the inherent disparities between urban and rural areas will still persist with small classes and low teacher absorption rate in rural and big class sizes in urban areas with multiple shifts. The Ministry affirms its desire to maintain reasonably smaller classes sizes and has an ambitious programme of eliminating the double shifting vice completely by 2015.

**Table 2 Teacher Requirements**

	<i>Estimate</i>		<i>Projected</i>				
	<i>Base</i> 2001	2002	2003	2004	2005	2006	2007
<b>Middle Basic (1-7)</b>	<b>35,603</b>	<b>37,933</b>	<b>38,498</b>	<b>38,809</b>	<b>38,921</b>	<b>38,745</b>	<b>38,414</b>
Public teacher needs	30,769	31,900	32,312	32,446	32,347	32,093	31,690
Private teacher needs	4,834	6,033	6,186	6,363	6,574	6,651	6,724
Annual Needs	4,466	2,841	2,621	2,440	2,159	1,994	4,816
<b>Upper Basic (8-9)</b>	<b>8,575</b>	<b>9,332</b>	<b>9,366</b>	<b>9,387</b>	<b>9,436</b>	<b>9,473</b>	<b>9,553</b>
Public teacher needs	7,382	7,672	7,573	7,452	7,335	7,210	7,110
Private teacher needs	1,193	1,660	1,793	1,935	2,101	2,263	2,443
Annual Needs	1,272	594	584	611	603	648	1,684

Note: (1) The Annual teachers needs are calculated by estimating total teacher needs for the following year. This means that the annual teacher needs are reported up to 2006 and not 2007.

### **Comparisons of Annual Teacher Needs with the Projected outputs**

The accelerated teacher development programme's success in meeting the country teacher needs will start yielding dividends in 2003 as there will be technically more teachers supplied to outstrip demand. While the estimated teacher total requirements for 2003 stands at 3,732, the estimated college output for the same years stands at 5,257. This implies that there will be 1,525 more teachers in the system than needed. Though this might appear to be the case, the situation on the ground is different because of four main reasons: a) the proportion of teachers currently pursuing further studies and effectively not teaching; b) the number of teachers who are not able to teach because of health problems; c) the number of new teachers who do not take up appointments upon being posted; and, d) the inherent problem of teacher distribution as it is very difficult to transfer teachers from overstaffed urban areas to understaffed rural areas.

**Table 3 Comparing Annual Teacher Needs with Projected Teacher Output**

	<i>Base</i>	<i>Estimate</i>	<i>Projected</i>			
	2001	2002	2003	2004	2005	2006
Total Annual Teacher Needs	<b>6,866</b>	<b>4,109</b>	<b>3,732</b>	<b>3,609</b>	<b>3,232</b>	<b>3,125</b>
<i>Of Which</i>						
<i>Middle Basic</i>	4,466	2,841	2,621	2,440	2,159	1,994
<i>Upper Basic</i>	1,272	594	584	611	603	648
<i>High School</i>	1,128	674	528	557	469	482
Teacher Training Programme Output*	<b>3,692</b>	<b>4,095</b>	<b>5,257</b>	<b>5,257</b>	<b>5,257</b>	<b>5,257</b>
Gap (Teacher Needs- Output)	3,174	14	(1,525)	(1,649)	(2,026)	(2,132)

#### Notes

\*Teacher Training Programme output for 2001 and 2002 is lower than in subsequent years because of the changes in the structure of the Middle Basic teacher training course:

ZATEC students were only fully enrolled in 2002. Output from 2003 onwards is estimated as 45% of total enrolment in teacher programmes in the previous year.

The figures for teacher output in 2001 and 2002 in the above table should be regarded with caution. The change in the Middle Basic teacher training system between 1998 and 2002 and the poor records on private students have contributed to problems in obtaining reliable estimates.

### **Capital Expenditure requirements**

The Ministry will continue to allocate a significant proportion of its capital budget to basic education for both new construction and rehabilitation. Slightly over half of the capital budgets during the planning period will be allocated to the lower and middle basic levels while upper basic will get 8%. It is further estimated that 28% will go to high schools, 2% teacher education, 2% continuing education, and 6% to University education respectively.

The average annual expenditure for lower and middle basic (Middle Basic) in 2001 constant Kwacha prices is estimated to be 143,110 million while that for Upper Basic is estimated to be 20,692. The average expenditure for high school capital projects is estimated for 75,325 million 2001 constant Kwacha prices, teacher training 5,177 million, Continuing education 6,105, and University 16,265 million.<sup>1</sup>

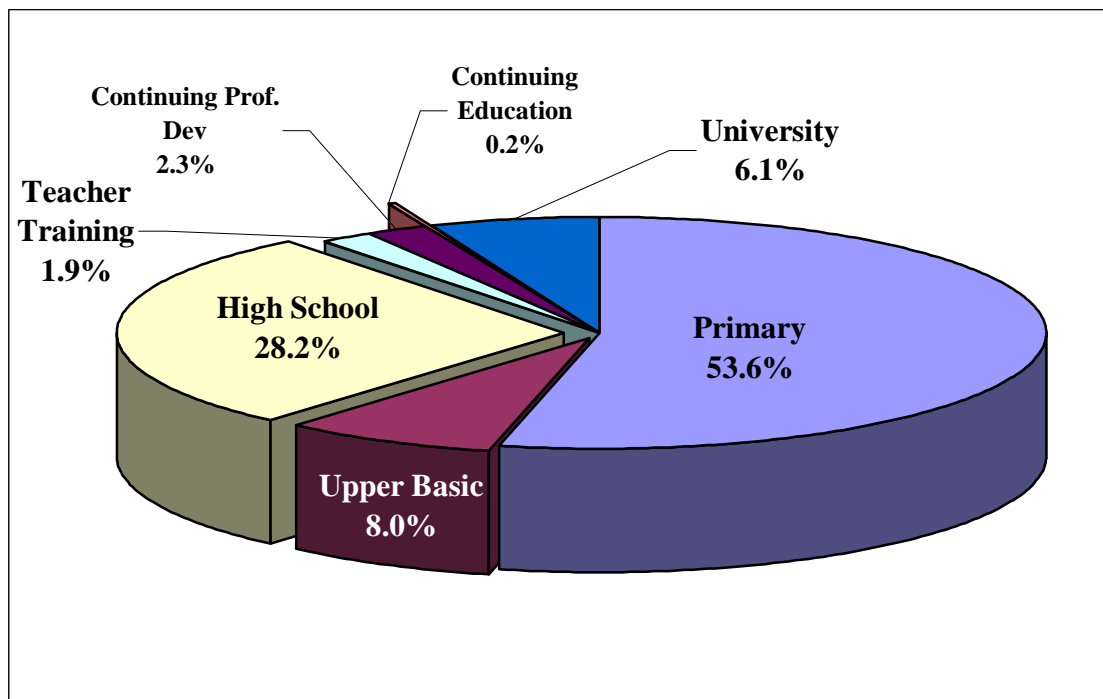
**Table 4 Capital Expenditure Projections (Million Kwacha, 2001 constant Prices)**

<i>Sub-Sector</i>	<i>Actual</i> <b>2001</b>	<i>share</i>	<i>Estimate</i> <b>2002</b>	<i>share</i>	<i>Projected</i> <b>2003-2007</b>	<i>share</i>	<i>Annual</i> <b>Average</b>
<b>2Middle Basic</b>	21,366	30%	57,286	43%	715,551	54%	143,110
<i>New Construction</i>	18,366		53,651		607,044		
<i>Rehabilitation</i>	3,000		3,635		108,506		
<b>3Upper Basic</b>	36,777	51%	24,269	18%	103,458	8%	20,692
<i>New Construction</i>	36,777		24,269		87,769		
<i>Rehabilitation</i>	0		0		15,688		
<b>4High School</b>	5,425	8%	29,008	22%	376,623	28%	75,325
<i>New Construction</i>	0		25,049		208,836		
<i>Rehabilitation</i>	5,425		3,959		167,787		
<b>5Teacher Training (pre-service)</b>	8,488	12%	14,405	11%	25,884	2%	5,177
<i>New Construction</i>	0		0		21,650		
<i>Rehabilitation</i>	8,488		14,405		4,234		
<b>6Continuing Professional Development</b>	0	0%	0	2%	30,526	2%	6,105
<b>7University</b>	0	0	6,553	5%	81,324	6%	16,265
<b>8Other* (Continuing Education)</b>	0	0%	0	0%	2,287	0%	457
	<b>72,056</b>		<b>133,999</b>		<b>1,335,652</b>		<b>267,130</b>

The estimated total amount of capital investments amount to 1,335,652 Zambian Kwachas in 2001 constant prices, which is equivalent to 369,884,243 US Dollars.

<sup>1</sup> The analysis of capital expenditure has been presented for all the sub-sectors in this section and will not appear in the other specific sub-sectors sections

**Figure 5 Capital Allocation by Sub-sector (2003 - 2007)**



Although the Ministry of Education sector plan is outlined into four distinct sections with well articulated intentions for each sub-sector based on agreed priority options with clearly projected costs, the analysis of capital investments is presented for all the sectors in the first sub-sector dealing with basic education as outlined.

### 2.1.3.2 Quality and Efficiency

The greatest challenge, however, in the next 5 years is to improve the overall quality of basic education in terms of improved learning outcomes. Pupils' performance will be monitored through regular National Assessment at middle basic level, the competency-based tests being introduced, and also through the Grade 7 and Grade 9 summative evaluations. In addition to remaining a selection tool for the time being, the Grade 7 examination will be used as an assessment tool to inform the Ministry of the levels of learning achievement at the middle basic level. The Grade 9 examinations will be restructured. In addition, completion rates at the end of Grade 7 and Grade 9 will provide a quality as well as an efficiency indicator of the Ministry. The Ministry has also since 1999 been conducting a National Assessment Survey of Learning Achievement in the fifth Grade.

The main objective of the National Assessment survey was to inform the Ministry of the Learning Achievement Levels and how they were changing overtime in the context of various inputs and contextual issues. Results between the two surveys indicate a marginal positive change in both English Reading and Mathematics. Absolute mean performance in English reading changed from 33.20 in 1999 to 33.43 in 2002 while for Mathematics, the change was from 35.30 to 37.74. Further, the proportion of pupils getting above the defined performance thresholds also improved appreciably. Proportion of pupils getting above the defined desirable level of performance also appreciably improved such that for every 3 pupils who will have achieved the desirable level of performance in 1999, there would be a corresponding 5 pupils in 2001 for the same level for Reading in English. The proportion of pupils getting the minimum level of performance rose from 23.1 to 29.3. The proportion of

pupils getting the minimum level of performance in Mathematics rose from 26.5% to 28.7% while those getting the desirable level of performance increased from 3.8% to 6.1%.

In terms of inputs, the Basic Education Curriculum Framework will be implemented through improved, revised syllabuses, teachers' guides, learning materials, comprehensive in-service training of teachers and regular monitoring by standards officers. Special attention will be paid to life skills and cross-cutting issues such as school health and nutrition, HIV/AIDS and environmental education. Another key priority is the extension of the Curriculum Framework to Grade 8 and 9 subjects, and an increase in contact hours particularly for Grades 1 – 4. There will be improved materials provision to pupils and teachers and a decentralised procurement and distribution system for textbooks is to be introduced by 2004 to help reach the target pupil: book ratio of 2:1.

Another key factor will be greater efficiency in the deployment and utilisation of teachers and classroom space, including gradual removal of triple and double shifting particularly in urban schools. There will be increased incentives for teachers to work in rural and remote areas, particularly female teachers, in terms of fast-tracked promotion and upgrading opportunities in addition to the current hardship allowances. The main target for the increase in teachers for grades 1 – 7 with a pupil: teacher ratio of 45:1, with special emphasis on reducing the disparities between urban and rural schools.

School health and nutrition programmes that have been piloted under BESSIP will also be extended to those districts and zones where malnutrition and ill-health have significant impact on pupil attendance and pupil performance.

**Table 5 Projected recurrent Unit Expenditure by sub sector and cost item**

Middle Basic (1-7)	Base Estimate		Projected							Growth 2001-07	Middle Basic 2003
	2001	2002	2003	2004	2005	2006	2007	2012	2017		
Teachers' salaries	85,556	93,305	91,040	88,830	86,673	84,569	82,516	113,871	154,292	-4%	118,334
Non-teacher salaries	1,320	1,320	1,334	1,347	1,361	1,375	1,389	18,197	19,604	5%	1,733
Learning supplies	7,657	7,657	26,596	26,596	26,596	26,596	26,596	26,596	26,596	247%	34,570
Bursary	787	1,552	1,000	1,000	1,000	1,000	1,000	1,000	1,000	27%	1,300
School operating expenses	11,706	18,376	18,376	18,376	18,376	18,376	18,376	18,376	18,376	57%	23,885
Special Programmes	11,308	14,710	14,333	15,198	17,982	22,064	28,834	46,098	62,591	155%	18,631
Standards Visits	415	441	740	727	715	704	694	824	975	67%	962
Assessment	1,261	1,240	1,233	1,239	1,245	1,274	1,337	1,225	1,534	6%	1,602
	<b>120,009</b>	<b>138,600</b>	<b>154,652</b>	<b>153,314</b>	<b>153,948</b>	<b>155,957</b>	<b>160,741</b>	<b>226,188</b>	<b>284,969</b>	<b>34%</b>	<b>201,017</b>

### 2.1.3.3 Stakeholder Partnerships

The willingness among parents, NGOs and religious organisations to participate more actively in education will continue to be encouraged, especially in rehabilitation and

construction of schools, and introduction of programmes that address HIV/AIDS issues. The need to target orphans requires special initiatives such as Community Schools and Interactive Radio Centres, but other line Ministries, religious groups and civil society organisations will be encouraged to play their part.

The numbers of special needs pupils will be increased through provision of trained teachers and special facilities and learning materials in collaboration with international and local agencies, the private sector, service clubs and similar welfare groups.

Private companies will be encouraged to invest in educational facilities for the children of their workforces in return for support from the Ministry in terms of teachers, grants and learning materials. Stronger linkages with private schools will be developed, and regulatory frameworks and licensing criteria reviewed.

#### *2.1.3.4 Early Childhood Care Education and Development*

This is a key new initiative to improve readiness and performance of pupils entering Grade 1, particularly in rural areas. In the next 5 years, the Ministry of Education will collaborate with Ministry of Local Government through district councils, and with local communities, NGOs, religious organisations and the private sector to develop pre-schools in rural basic schools. A task force comprising the key stakeholders will be set up in 2003 to develop detailed targets, costings and activities in order to implement the programme from 2004 onwards.

#### *2.1.3.5 Adult Literacy*

Since parent's own literacy plays a significant role on pupils' enrolment, attendance and performance, the Ministry will also revive adult literacy classes, based on demand, through the Directorate of Distance Education in collaboration with the Ministry of Community Development and Social Services, UNZA, NGOs and religious organisations. A unit will be set up to co-ordinate training and compensation of adult literacy tutors along with development, procurement and provision of appropriate literacy materials.

#### *2.1.3.6 Administration, Financing and Management*

District Education Boards will manage basic schools in each district. However, each school will be expected to develop plans and a budget for the year, forward these to the Board, and account for monies received and spent on time. The Board will encourage better school management and leadership, increase teacher retention and motivation, and address teacher absenteeism and indiscipline directly.

#### *2.1.3.7 HIV/AIDS*

Schools will play an active role in developing and implementing activities targeting the prevention or mitigation of HIV/AIDS, including peer counselling and protection mechanisms for teachers and students. Information and awareness raising will be enhanced through distribution of newsletters, magazines and development of HIV/AIDS issues in the curriculum and related materials. Replacements will be provided for teachers and administrators who are absent through sickness or have died, through re-employment of retired personnel and creation of a pool of relief or 'supply teachers' for quick redeployment.

#### *2.1.3.8 Ongoing Programmes - BESSIP*

The key areas that have been addressed through the implementation of BESSIP will continue to be the overall priority of the Strategic Plan. These include school infrastructure, educational materials, teacher education, curriculum development and capacity building. Crosscutting interventions such as HIV/AIDS Prevention and Impact Management, Equity and Gender, and School Health and Nutrition will be fully integrated into Ministry line functions under the Directorate of Planning and Information and expanded.

#### **2.1.4 Cost Projections for Basic Education**

The cost projections were based on the 2001 constant prices and projected up to 2007 in Zambian Kwacha. Costings were projected both in current and constant prices taking into account the GDP deflator and inflation. The table presented below is in current prices. In the last section of this chapter another table on financing projections based on constant prices has also been presented.

**Table 6 Costing Projections in Constant Kwacha at 2001 Prices**

Middle Basic (1-7)	Base	Estimate		Projected						Growth 2001- 07	Middle Basic 2003
		2001	2002	2003	2004	2005	2006	2007	2012		
Teachers' salaries	85,556	93,305	91,040	88,830	86,673	84,569	82,516	113,871	154,292	-4%	118,334
Non-teacher salaries	1,320	1,320	1,334	1,347	1,361	1,375	1,389	18,197	19,604	5%	1,733
Learning supplies	7,657	7,657	26,596	26,596	26,596	26,596	26,596	26,596	26,596	247%	34,570
Bursary	787	1,552	1,000	1,000	1,000	1,000	1,000	1,000	1,000	27%	1,300
School operating expenses	11,706	18,376	18,376	18,376	18,376	18,376	18,376	18,376	18,376	57%	23,885
Special Programmes	11,308	14,710	14,333	15,198	17,982	22,064	28,834	46,098	62,591	155%	18,631
Standards Visits	415	441	740	727	715	704	694	824	975	67%	962
Assessment	1,261	1,240	1,233	1,239	1,245	1,274	1,337	1,225	1,534	6%	1,602
	<b>120,009</b>	<b>138,600</b>	<b>154,652</b>	<b>153,314</b>	<b>153,948</b>	<b>155,957</b>	<b>160,741</b>	<b>226,188</b>	<b>284,969</b>	<b>34%</b>	<b>201,017</b>

Upper Basic (8-9)	Actual	Estimate		Projected						Growth 2001- 07	Upper Basic 2003
		2001	2002	2003	2004	2005	2006	2007	2012		
Teachers' salaries	214,199	243,967	226,744	210,737	195,860	182,033	169,182	190,737	220,892	-21%	294,723
Non-teacher salaries	12,564	11,396	11,385	10,974	10,556	10,133	9,877	18,001	15,757	-21%	14,798
Learning supplies	5,470	5,697	17,100	17,100	17,100	17,100	17,100	17,100	17,100	213%	22,227
Bursary		4,972	7,936	9,456	11,268	13,427	16,000	24,000	24,000		10,315
Boarding	9,112	7,572	6,483	5,704	5,002	4,448	4,028	1,352	-	-56%	8,426
School operating expenses	11,108	16,134	16,239	16,344	16,449	16,554	16,624	17,500	18,376	50%	21,107
Special Programmes	7,088	7,510	9,468	11,512	15,660	17,697	20,245	32,814	49,361	186%	12,306
Standards Visits	1,779	2,190	2,853	2,664	2,491	2,331	2,214	1,981	1,762	24%	3,708
Assessment	27,939	28,460	28,297	28,050	27,769	27,631	27,231	27,270	27,668	-3%	36,781
	<b>289,260</b>	<b>327,900</b>	<b>326,504</b>	<b>312,541</b>	<b>302,156</b>	<b>291,354</b>	<b>282,500</b>	<b>330,753</b>	<b>374,916</b>	<b>-2%</b>	<b>424,393</b>

The Ministry will provide 585,000 school places (equivalent to around 10,000 classrooms) to address the current shortfall of school places as well as to cater for the increasing enrolment. During the costing, double shifting has been limited to grades 1-4, Classroom-pupil ratio has been assumed at 1:45 while one multi-functional oversized classroom for upper basic per single stream. The Ministry will also provide 1,650 teachers' houses mainly in rural areas. Specifically, 4 teachers' houses per single streamed Upper Basic School (which is roughly 1.5 more than the current allocation norm) will be constructed. For urban areas: 0.75 teacher's house per single streamed Upper Basic school (since most urban schools are multi-stream, this ratio guarantees that each urban school can be provided with at least one teacher house for security). Additionally, the Ministry will carry out major rehabilitation works of 4,500 classrooms and 3,500 teachers' houses, and repair minor defects for 8,000 classrooms and 5,000 teachers' houses.



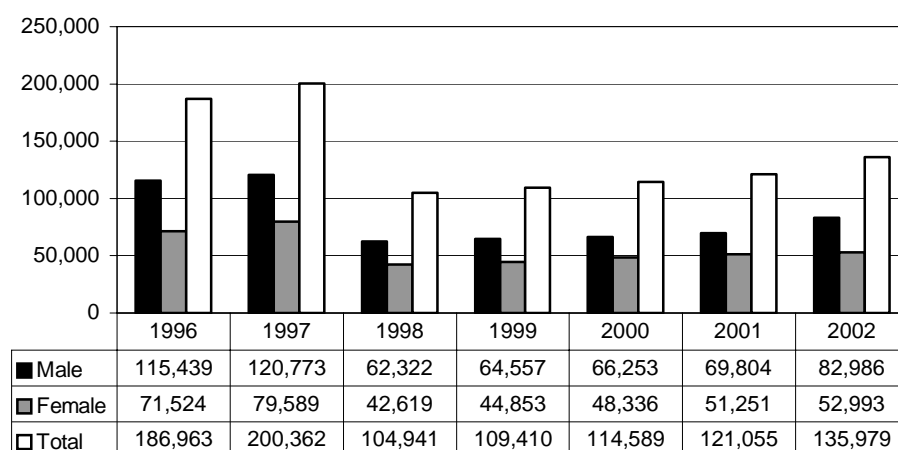
## 3.2 High School Education

### 2.2.1 Situational Analysis

The High School Sub-sector has been neglected in the last few years due to the poor economic situation in the country and the increased allocation of resources to the basic sub-sector. The total number of schools in 2001 was 256 of which 208 are government, 33 are grant-aided and 15 are private. The overwhelming majority still have a Grade 8-12 structure with only two schools catering for only grades 10 – 12.

The enrolment for grades 10 – 12 in 2001 was 121,000 pupils, of which girls made up 42% of the total. These figures include the pupils enrolled in the Academic Production Units (APU). The APUs were established in 1996 to offer more places for pupils who, otherwise, would not have had the opportunity to attend the regular classes and cater for grades 8 – 12. The classes are taught in the afternoons and the pupils pay a tuition fee. By 1997 the enrolment rates had increased greatly and the system was becoming overwhelmed, which had serious effects on the quality. In 1998 the Ministry decreed that enrolment for APUs should be limited to no more than one-third of the total enrolment for the regular classes. For this reason, enrolment dropped after 1997.

**Figure 3 Enrolment Trends for Grade 10 – 12 by Gender including APU (1996 – 2001)**



Source: Ministry of Education, Planning Unit

There are presently not enough school places for pupils with only 25.9% of children progressing from basic to high schools. Girls have a slightly higher rate of progression than boys. However, due to the accommodation of Grades 8 and 9 at basic school level, there is currently a nationwide overprovision of high school places of around 50,000, equivalent to 1,100 classrooms. Additionally, There is a backlog in the provision of teachers' houses of around 400 units. 70% of the existing 3,300 classrooms and 70% of the 3,200 teachers' houses needs to be rehabilitated, 15% of the classrooms and 30% of the houses have major defects.

**Table 6 Construction and Rehabilitation Expenditures for 2001**

	Total cost of new construction in USD	Total cost of new construction in ZMK at constant 2001 prices	Total cost of rehabilitation in USD	Total cost of rehabilitation in ZMK at constant 2001 prices
		3,528		3,528
<b>Lower and Middle Basic</b>				
new construction	172,057,054	607,044,297,741		
rehabilitation			30,754,370	108,506,246,838
<b>Upper Basic</b>				
new construction	24,876,840	87,769,398,089		
rehabilitation			4,446,615	15,688,357,521

The total number of teachers in secondary and high schools was 7,588 in 2001. This figure also includes those who are teaching in grades 8 and 9. Female teachers represent 27.7% of the total and females head only 18.5% of the high schools. The pupil:teacher ratio for grades 10 – 12 was 19:1. There is a particular lack of teachers in subjects like mathematics and sciences.

The condition of many of the existing classrooms is deplorable and laboratories and other practical study rooms have fallen into disrepair. Almost no investment has been made in the last years to counter the situation. The condition of the classrooms and the curriculum, which is considered by many to be largely irrelevant, have greatly contributed to the low level of quality in the high schools.

The low quality of education can also be observed from the relatively low numbers of pupils receiving the School Certificate upon completion of their studies. In 2001, 65.7% of the pupils received their certificates, with far higher rates in private and grant-aided schools. Girls have a significantly lower rate with 59.8% receiving school certificates.

Around 5,000 students are being trained at 13 vocational training centres under the present Continuing Education Department. 10 of these centres have been rehabilitated and extended recently. Less than 20% of the 160 vocational instructors are provided with staff houses. There is a backlog in the provision of instructors' houses of around 50 units.

## 2.2.2 Sub-sector Goals

THEME	WORK PROGRAMMES	SUB-SECTOR GOAL
Access/Equity	<b>Policy and Planning</b> <b>Financial Management</b> <b>Procurement</b> <b>Infrastructure</b> <b>Distance Education</b>	1. Expand access and retention especially for girls, rural children, children with special educational needs, orphans and other vulnerable groups
Quality	<b>Teacher Education</b> <b>Curriculum and Assessment</b> <b>Standards and Evaluation</b>	2. Improve the national performance in the School Certificate examination. 3. Provide a relevant and diversified curriculum, which develops appropriate skills and knowledge for formal/non-formal sector employment.
Administration, Financing and Management	<b>Policy and Planning</b> <b>Human Resource and Administration</b> <b>Institutional Development</b>	4. Strengthen the capacity of the High School Education Boards to plan, cost, manage and monitor the delivery of education services.
HIV/AIDS	<b>Policy and Planning</b> <b>Special Issues</b>	5. Develop and support actions aimed at mitigating and reducing the impact of HIV/AIDS on High Schools.

*N.B. The specific objectives for each sub-sector can be found in the National Implementation Framework Summary in the Appendices*

## 2.2.3 Strategic Summary

### 2.2.3.1 Access/Equity

Since 1999 the government and its co-operating partners have been investing in the middle basic<sup>2</sup> education level in a quite significant way. The upper basic education level benefited somewhat from investments in the middle basic education level as the resources in schools running Grades 1 to 9 are mutually shared. However, the high school education level, previously called senior secondary, has not seen much investment since the late 1980s. Equally the Upper Basic or Junior Secondary level that was being run from secondary schools was not benefiting.

While access and equity are important issues considering the low progression and enrolment rates, the initial focus will be on improving the quality and relevance of the system. However, the Ministry intends to raise transition rates from Grades 9 to 10 from 46% in 2002 to 50% by 2007 leading to an increase in enrolments from 18% to 28%. On the other hand, completion rates are expected to rise from 19% in 2002 to 26% by 2007.

To achieve this, 18,500 additional school places (equivalent to 440 classrooms) will be created to cater for the increased enrolments. The full boarding places will be maintained at

<sup>2</sup> A school referred to as Middle Basic is analogous to Primary Education which runs from Grades 1 to 7.

the 2001 number (32,000 approximately) while the Ministry will also create 16,000 places for weekly boarding in rural high schools.

Additionally, 1,000 teachers' houses will be built following a ration of 1 teacher's house per 50 students (or 10 teachers' houses per standard 504 capacity high school). Further new school places will be planned close to population centres to permit part of the teaching force to rent accommodation. Major rehabilitations will also take place for 500 classrooms, 900 teachers' houses, and repair of minor defects for 1,600 classrooms and 1,400 teachers' houses. During the period 2003 – 2007, 50 instructors houses will be constructed.

Since cost-sharing remains a necessity at high schools, the Ministry will introduce more cost-efficient measures for increasing access for girls, rural children, the poor and vulnerable. The increase in Full Basic Schools offering grades 1 - 9 will free up more space for expansion of enrolment in existing high schools. Teachers will be utilised more efficiently in terms of maximising their class contact time, and single shifting introduced where possible. Research into cheaper ways of construction and rehabilitation of school buildings will also be carried out. Efforts will also be made to reduce the cost of textbooks and learning materials.

Apart from increasing bursary provision and providing a percentage of places for vulnerable groups in rural boarding schools, the Ministry will expect Education Boards to consider options such as raising funds to provide places for poor pupils, sensitising leaders and communities on the importance of girls' education, developing single sex classes, and minimising or abolishing fees for open learning centres. Boarding is expensive, and where possible the Ministry will seek to open more day High Schools in rural and semi-urban areas to increase places and reduce costs for pupils in the rural areas. The upgrading of existing appropriate basic schools to high schools will be one way of carrying out this process.

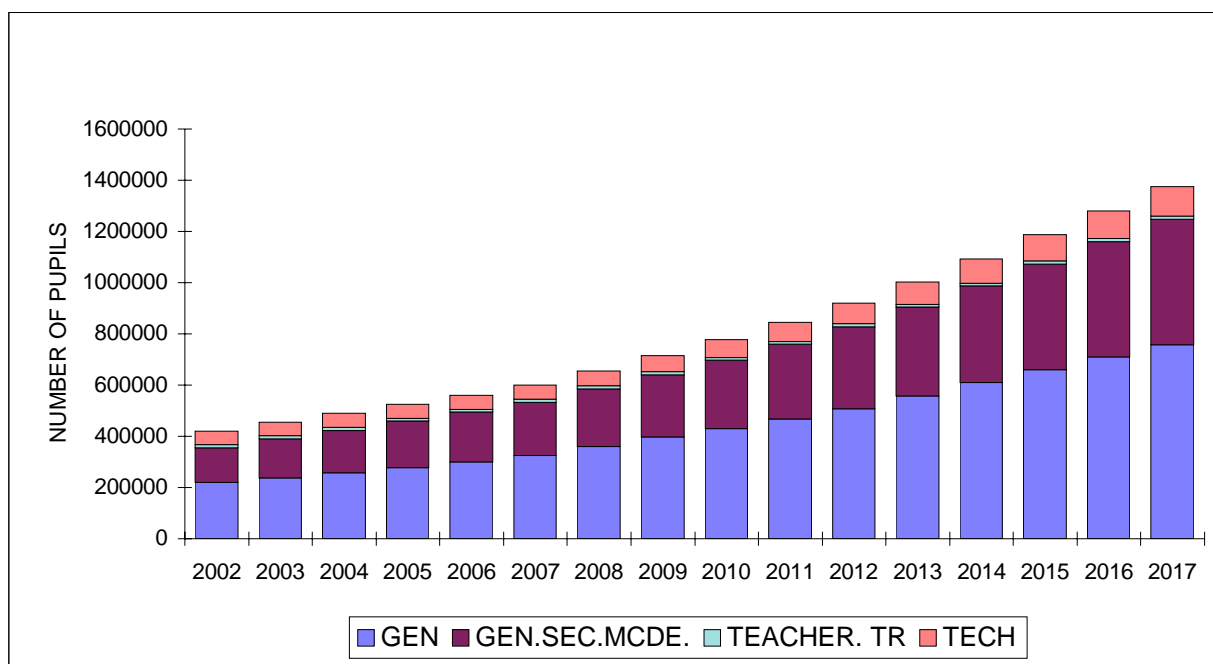
The Academic Production Unit system will be continued to allow those that can afford the additional fees to access high school education, but the guidelines will be more strictly administered through the Directorate of Distance Education. Open and distance learning will remain an important option in the next five years for out-of-school pupils and adults to complete their School Certificate through evening classes.

To increase access, many of the government high schools will need major rehabilitation programmes particularly in terms of classrooms, practical subject rooms, and improvement of water and sanitation facilities. The provision of boreholes, solar power, and pit latrines will be increased.

**Table 7 Enrolment Related Targets**

<b>High School (10-12)</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>
Transition rates	44%	46%	46%	47%	48%	49%	50%
Gross enrolment rate	18%	20%	22%	24%	26%	27%	28%
Completion rate	18%	19%	22%	22%	24%	25%	26%
Repetition rates	1%	1%	1%	1%	1%	1%	1%

**Figure 6 Secondary School enrolment Projections**



### 2.2.3.2 Quality and Efficiency

The quality of high school education will ultimately be assessed by pupils' performance in the School Certificate examination at end of Grade 12. The target is to achieve an average of 72% by 2007 from the current 66%. However, learning outcomes can also be monitored by continuous assessment and by tracking surveys to determine where high school graduates have gone after Grade 12. As part of future curriculum reform, all these assessment procedures will be revised and up-dated.

In 2003, a major review of the high school education sector will take place with emphasis on curriculum reform and stronger linkages between life skills at basic education level, vocational centres under Distance Education and skills training centres under TEVETA, higher education and the world of work. A framework of competencies will be developed that dovetail into the different levels and courses offered across the different institutions. Specific areas such as design and technology, business studies and information technology will be given particular prominence in this respect. All high schools will need to develop pre-vocational skills and competencies alongside core subjects, but the range and depth of syllabi will depend on the curriculum review.

In addition, psychosocial life skills such as assertiveness, gender equality, human rights and governance will need to be included along with cross-cutting issues such as HIV/AIDS, nutrition and environmental education. Once the new curriculum is developed, it will require introduction into the teacher education curriculum, and in-service training programmes across the country. The curriculum will make new demands on teachers in terms of changes in teaching style especially with life skills, and special attention will have to be paid to ethics and abuse in schools. Regular support and monitoring by standards officers and in-service providers will be necessary.

Teacher provision across the country will be improved, based on a comprehensive subject needs and human resource analysis. Teachers will also be utilised more efficiently in terms of maximising their class contact time in each subject area. The target will be to raise the pupil:teacher ratio from 19:1 in 2002 to 28:1 by 2007. While the Diploma courses will be

retained as they still supply the bulk of high school teachers, there are plans to upgrade Nkrumah Teachers' College to a University College to increase the supply of graduate teachers. In addition, expansion of distance education provision, like the Middle Basic distance diploma scheme, would enable diploma holders to acquire degrees while remaining in the classroom. The retention of degree and diploma teachers will need to be increased by a package of incentives such as review of salary scales, better housing, access to loans, staff development opportunities, and hardship allowances.

**Table 8 Teacher requirements**

	2001	2002	2003	2004	2005	2006	2007
High School (10-12)	5,243	6,056	6,366	6,512	6,678	6,747	6,825
Public teacher needs	4,085	4,578	4,699	4,682	4,668	4,575	4,481
Private teacher needs	1,158	1,478	1,667	1,830	2,011	2,172	2,343
Additional Annual Needs	1,128	674	528	557	469	482	

Note: (1) 6% annual attrition is assumed

(2) The additional annual teacher needs are calculated by estimating total teacher needs for the following year and subtracting this from the existing teacher stock allowing for attrition. This means that annual needs are reported up to 2006 not 2007.

The Ministry will address the lack of educational materials in High Schools. Through decentralised procurement, the Boards will become responsible for provision of learning/teaching materials (including library books and textbooks), equipment, machines and specialised apparatus. Radio programmes and other media under ICT, particularly for sciences, practical subjects and life skills, will supplement these.

**Table 9 Teaching and Learning Material (TLM) Requirements**

Teaching materials	Unit cost (US\$)	Quantity per teacher	Total cost per teacher (US\$)	Total cost per teacher (K)	Total cost per pupil (@ PTR 50:1) (US\$)	Total cost per pupil (K)
Chalk (box)	1.0	9	9	32,499	0.18	650
Notebook (hard)	3.0	6	18	64,998	0.36	1,300
Exercise books	0.2	20	3.56	12,855	0.0712	257
Chart paper(ream)	4.8	1	4.75	17,152	0.095	343
Felt pens (12)	5.5	1	5.5	19,861	0.11	397
Duster	1.0	1	1	3,611	0.02	72
			42	150,976	0.8	<b>3,020</b>
<b>Total Cost Per Pupil for TLM</b>						<b>21,427</b>

### 2.2.3.3 Distance Education

There will be a complete overhaul of open and distance-learning provision at this level, including provision of better tuition, improved learning materials, and streamlined management and co-ordination. The National Correspondence College will be revamped to improve the overall quality of delivery, and increased use made of information and communications technology, particularly radio, to enhance learning.

### 2.2.3.4 Stakeholder Partnerships

Many high schools, especially grant-aided institutions, have already demonstrated that through well-organised PTAs or Boards, funds can be raised from the community to

complement government grants. The traditional partnership with grant-aided institutions will be strengthened particularly with religious groups and communities., Partnerships with the private sector for construction of facilities will also be pursued in return for support from the Ministry in terms of teachers, grants and learning materials. Stronger linkages with private schools will be developed, and regulatory frameworks and licensing criteria reviewed.

### 2.2.3.5 Administration, Financing and Management

The High School Education Boards will be expected to develop plans and a budget for the year, forward these to the Ministry through the District and Provincial offices, and account for monies received and spent on time. The Boards will encourage better school management and leadership, initiate fund-raising ventures, increase teacher retention and motivation, and address teacher absenteeism and indiscipline directly.

### 2.2.3.6 HIV/AIDS

Schools and Education Boards will play an active role in developing and implementing activities targeting the prevention or mitigation of HIV/AIDS, including peer counselling and protection mechanisms for teachers and students. Information and awareness raising will be enhanced through distribution of newsletters, magazines and development of HIV/AIDS issues in the curriculum and related materials. Replacements will be provided for teachers and administrators who are absent through sickness or have died, through re-employment of retired personnel and creation of a pool of relief or 'supply teachers' for quick redeployment.

## 2.2.4 Cost Projections for High School Education

Table 10 Cost Projections for High Schools

High School	Actual	Estimate	Projected							Growth	High school
	2001	2002	2003	2004	2005	2006	2007	2012	2017	2001-07	2003
Teachers' salaries	254,895	325,362	304,478	284,935	266,647	249,532	233,516	264,145	284,564	-8%	395,763
Non-teacher salaries	40,695	40,695	42,545	42,859	43,178	43,502	43,830	47,218	50,868	8%	55,300
Learning supplies			13,904	13,904	13,904	13,904	13,904	13,904	13,904		18,073
Bursary Boarding	-		-	6,930	13,709	20,396	26,988	38,848	37,687		-
School operating expenses	31,907	29,591	26,580	24,598	22,748	21,396	20,140	13,519	8,810	-37%	34,548
Special Programmes	9,614	9,614	9,614	9,614	9,614	9,614	9,614	9,614	9,614	0%	12,496
Standards Visits	941	941	6,126	8,918	15,322	17,943	21,170	32,330	44,215	2150%	7,963
Assessment	5,193	7,278	9,403	9,081	8,790	8,528	8,293	8,836	9,227	60%	12,222
	45,943	45,577	47,035	45,147	45,939	45,337	44,500	44,061	43,903	-3%	61,136
	<b>389,188</b>	<b>459,058</b>	<b>459,684</b>	<b>445,987</b>	<b>439,850</b>	<b>430,152</b>	<b>421,956</b>	<b>472,476</b>	<b>502,791</b>	<b>8%</b>	<b>597,501</b>

## 2.3 Tertiary Education

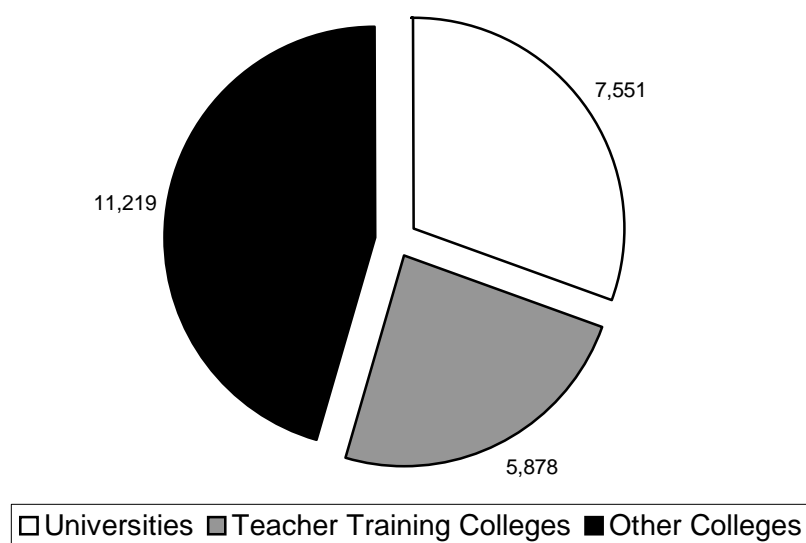
### 2.3.1 Situational Analysis

The Tertiary Sub-sector can be characterised by two specific groups. The first are those institutions falling directly under the Ministry of Education. These include the two universities – the University of Zambia (UNZA) and the Copperbelt University (CBU). In addition, there are 14 Teacher Training Colleges in the country of which 12 cater for the production of teachers for grades 1 – 7 and the other two for upper basic and high schools. The Natural Resources Development College also provides teachers for agricultural science.

The second group are those colleges registered under the Technical Education, Vocational and Entrepreneurship Authority (TEVETA), which consist of 151 colleges offering diplomas in various fields. Roughly half of these colleges are private with the remaining run by the government, religious organisations or the community.

The number of students enrolled in these tertiary institutions numbered 24,648 in 2000. The number of females enrolled in the TTCs is slightly higher than that of males. Women account for 32% in UNZA, only 19% in CBU and 42% of the enrolment in the colleges registered under TEVETA.

Figure 4 Number of Students Enrolled in Tertiary Institutions (2000)

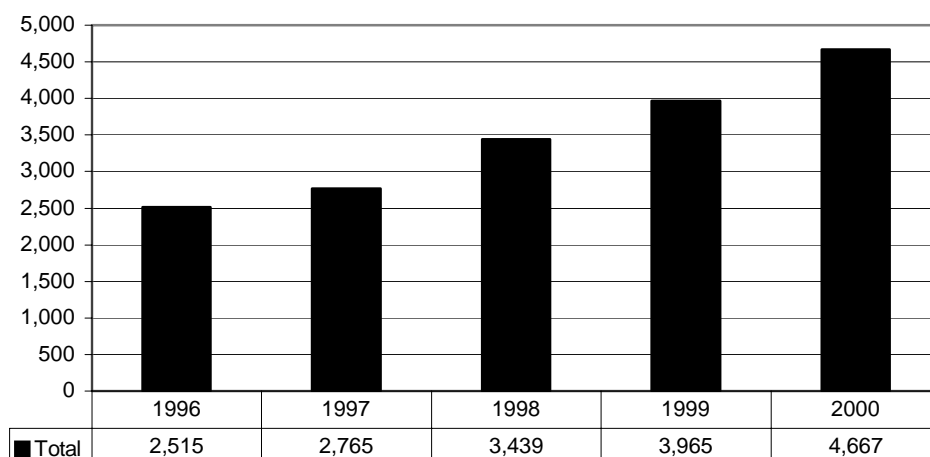


Source: Ministry of Education, Planning Unit; TEVETA; UNZA; CBU

The output of teachers has been increasing in the last years. In 2000, the total output of the 14 TTCs was 4,667 new teachers. The Zambia Teacher Education Course (ZATEC) is currently producing 4000 new teachers per year for grades 1 – 7.



**Figure 5 Output of Teacher Training Colleges (1996 - 2000)**



Source: Ministry of Education, Teacher Education

Currently, the involvement of UNZA in teacher education lacks co-ordination with national initiatives, despite having initial teacher education for high school teachers, a Special Education Department and an embryonic degree programme in Middle Basic education.

The total number of professional and teaching staff at UNZA is currently at 516 and 180 for CBU. In the area of teacher training and development, the Ministry of Education currently provides 14 Teacher Training Colleges with a total enrolment of 5,878 students in 2000. The number of lecturers in the colleges totals 384.

### 2.3.2 Sub-sector Goals

THEME	WORK PROGRAMMES	SUB-SECTOR GOAL
<b>Access/Equity</b>	<b>Policy and Planning</b> <i>Financial Management</i> <i>Procurement</i> <i>Infrastructure</i> <i>Distance Education</i>	1. Increase access to colleges of education and universities through formal and distance modes, particularly for those with special education needs, women, and vulnerable groups.
<b>Quality</b>	<b>Teacher Education</b> <i>Curriculum and Assessment</i> <i>Standards and Evaluation</i> <i>University</i>	2. Improve production of professionally competent teachers for the new curricula in co-ordination with UNZA, private institutions and other line Ministries.  3. Provide a high quality university education system, which will produce skilled, productive and socially responsible human resources for the changing needs of the country.
<b>Administration, Financing and Management</b>	<i>Policy and Planning</i> <i>Human Resource and Administration</i>	4. Strengthen the capacity of the College Education Boards to plan, cost, manage and monitor the delivery of quality teacher education.

THEME	WORK PROGRAMMES	SUB-SECTOR GOAL
	<i>Institutional Development University</i>	5. Develop a well-managed university system in terms of sound administration, financial planning, and cost-recovery.
HIV/AIDS	<b>Policy and Planning Special Issues</b>	6. Develop and support actions aimed at mitigating and reducing the impact of HIV/AIDS on colleges and universities.

*N.B. The specific objectives for each sub-sector can be found in the National Implementation Framework Summary in the Appendices*

### 2.3.3 Strategic Summary

#### 2.3.3.1 Teacher Education

##### *Initial Teacher Training*

In the case of Teacher Education, two key developments are planned. Firstly, all institutions offering initial teacher education will become Colleges of Education. This will ensure that both basic and high school teacher education qualifications are recognised equally. All colleges will be involved in the education of teachers for grades 1-9 while some will train teachers for grades 10-12. Early Childhood Care, Education and Development will be included in the basic teacher education curricula. The ZATEC programme will be revised to cater for Grades 8 to 9, and the overall course duration will be extended from two to three years. One of the major tasks for the College Education Boards will be to consider means of increasing access to college for vulnerable groups such as women, the poor, and students with special needs.

**Table 11 Comparing Annual Teacher Needs with Projected Teacher Output**

	2001	2002	2003	2004	2005	2006
Total Annual Teacher Needs	6,866	4,109	3,732	3,609	3,232	3,125
Of Which: Middle Basic	4,466	2,841	2,621	2,440	2,159	1,994
Upper Basic	1,272	594	584	611	603	648
High School	1,128	674	528	557	469	482
Teacher Training Programme Output*	3,692	4,095	5,257	5,257	5,257	5,257
<b>Gap (Teacher Needs- Output)</b>	<b>3,174</b>	<b>14</b>	<b>(1,525)</b>	<b>(1,649)</b>	<b>(2,026)</b>	<b>(2,132)</b>

Teacher Training Programme output for 2001 and 2002 is lower than in subsequent years because of the changes in the structure of the Middle Basic teacher-training course. ZATEC was only fully enrolled in 2002. Output from 2003 onwards is estimated as 45% of total enrolment in teacher programmes in the previous year. The figures for teacher output in 2001 and 2002 in the above table should be treated with caution. The change in the Middle Basic teacher training system between 1998 and 2002 and the poor records on private students have contributed to problems in obtaining reliable estimates.

##### *Continuous Professional Development*

The second major development will be a properly co-ordinated system of Continuous Professional Development involving colleges, teachers' resource centres, the National In-service College (NISTCOL), Zambia Institute for Special Education (ZAMISE) and UNZA. There is already an effective network of teachers' resource centres (TRC) spanning all provinces and districts, and an in-service system that reaches Zonal and school levels. Emphasis in the next 5 years will be strengthening Zonal and school-based INSET so that in-service programmes impact more directly on teachers. There will also be a need to ensure all TRCs cater for high school as well as basic education teachers.

NISTCOL will provide professional development courses for senior staff such as Inspectors, school and college managers, and Education Officers and INSET providers. In addition it will expand its distance education function, starting with the newly developed Diploma in Education by distance. UNZA will continue to have an important role as an award-granting body, but will also make a greater contribution to national teacher education policy. It will also be involved in current plans to develop Nkrumah Teachers College into a university college producing graduate teachers.

### *Teacher Utilisation and Deployment*

The Ministry of Education has developed comprehensive guidelines for Human Resource Deployment and Promotion for its staff including teachers in the Ministry. These guidelines will help to redress the historical staffing inadequacies and contribute to the development of new, dynamic and collective personnel practices.

A major initiative will be to review conditions of service and deployment of teachers and come up with improvements in postings and career structure. A range of incentives will be developed for teachers prepared to work in rural areas, especially women, and to retain specialist teachers in Grades 8 and 9 and also in high schools. Some of these incentives will include increased hardship allowances according to remoteness of rural areas, and provision of loans or allowances for teachers' housing. Another key issue is the rate of teacher attrition due to HIV/AIDS, which involves careful planning for training provision, as well as developing a relief teacher system.

### **2.3.3.2 University Education**

#### *Financing*

Although the universities are autonomous, much of their funding comes from government through grants and student bursaries. The challenge therefore is for the universities to generate their own resources to supplement government funding. To ensure better planning between the Ministry of Education and universities, accurate targets of teachers needed in each discipline will be communicated to the Schools of Education, as well as to the Natural Resources Development College. One way to attract additional financial investment is for the universities to ensure that the courses and expertise they offer are relevant to the needs of government and the private sector.

To reduce debts and begin to attract financial flows, current initiatives will be developed further. The increase of private students is one such initiative, and also the encouragement of commercial development on university land, including centres with flats for students and lecturers. Other cost recovery strategies will include better management of consultancy fees so they benefit the institutions as well as individuals, and the development of specialised, tailored short and long courses for industry and government. Other business ventures will include hosting of seminars/conferences, support to development of ICT networks and commercialisation of ancillary units.

The implications of this for administration, financing and management are considerable and the quality of financial management at the current universities, faculties and schools will need to be greatly improved.

#### **2.3.3.3 Access/Equity**

The high cost of university education means that bursaries are insufficient for those who qualify for admission but cannot afford the fees. In addition, universities will have to invest in rehabilitation and expansion of infrastructure, especially hostels, to cater for increased access. While the government will be increasing bursaries for women, the poor, and students with special needs, the universities are also revising their admissions policies to enable greater access in general.

The following initiatives are also being planned: increasing admission for privately-sponsored students; expanding distance and evening classes; and development of partnerships with businesses to set up foundations for financial assistance to students from disadvantaged backgrounds. For those who are not so disadvantaged, a loan scheme will be implemented. The government is also considering additional ways of increasing access and diversifying courses. One option is converting some existing colleges into university colleges. Another option is creating new faculties at existing universities, while the third option is establishing a new university.

#### **2.3.3.4 Relevance**

The universities will ensure that the courses and expertise they offer are relevant to the needs of government and the private sector. This will necessitate a continuous review of the curricula offered. It is also important for universities to engage more with key educational issues and policies relating to poverty reduction, particularly at basic and high school level. In this respect, co-ordination with Ministry of Education will improve in the areas of teacher education, curriculum development, special education, distance learning, and adult basic education, including adult literacy.

In particular, stronger linkages will be established between the School of Education and the Directorate of Teacher Education, and between the Centre for Continuing and Distance Education, Centre for Life-Long Learning and the Directorate of Distance Education. A structure of open and distance learning will be set up from Grade 8 to degree and post-graduate level, with properly co-ordinated programmes for adult basic education and adult literacy instead of the current fragmented initiatives.

In future university management will be represented at senior management meetings in the Ministry, and the Higher Education Authority will provide a major focal point for regular communication.

#### **2.3.3.5 HIV/AIDS**

Universities and colleges will play an active role in developing and implementing activities targeting the prevention or mitigation of HIV/AIDS, including voluntary counselling and testing, condom supply, and other support mechanisms. Information and awareness-raising will be enhanced through distribution of newsletters, magazines and development of HIV/AIDS issues in the curriculum and related materials.

### 2.3.4. Cost Projections for Tertiary Education

#### Teacher Education

Pre-Service Teacher Education Colleges for basic education teachers have a shortfall of around 250 student places, and the two training colleges for high school teachers need rehabilitation. The Ministry between 2003 and 2007 will provide around 1,000 training college places to address the backlog as well as to cater for the increasing enrolment. These additional places are based on the assumption that all students will be boarders to give equal opportunities to eligible students to be selected on the basis of merit.

Staff houses will be provided at a ratio of 1 house per 24 students. Further, major rehabilitation works at two training colleges for high school teachers will be carried out, and professional development will become a common practice in the Ministry. Of the envisaged 800 zone resource centres, 100 are being established, while 72 will be created through modification of district centres. There is a shortfall of 618 zone resource centres. The Ministry proposes to provide 618 zone resource centres. A needs assessment will be carried out to ascertain the most needy areas.

**Table 12 Expenditure Projections for Teacher Education**

Teacher Training (pre.)	Estimate		Projected							Ttraining 2003
	Actual 2001	2002	2003	2004	2005	2006	2007	2012	2017	
Lecturers' salaries	333,258	333,258	338,257	343,331	348,481	353,708	359,014	386,766	416,663	439,669
Non-teacher salaries	56,091	56,091	56,091	56,091	56,091	56,091	56,091	56,091	56,091	72,907
Program expenses	1,583,672	1,583,672	1,583,672	1,583,672	1,583,672	1,583,672	1,583,672	1,583,672	1,583,672	2,058,467
Assessment	46,199	46,199	46,199	46,199	46,199	46,199	46,199	46,199	46,199	60,050
	<b>2,019,220</b>	<b>2,019,220</b>	<b>2,024,219</b>	<b>2,029,293</b>	<b>2,034,443</b>	<b>2,039,670</b>	<b>2,044,976</b>	<b>2,072,727</b>	<b>2,102,624</b>	<b>2,631,094</b>

Continuing Prof. Dev.	Estimate		Projected							CPDev. 2003
	Actual 2001	2002	2003	2004	2005	2006	2007	2012	2017	
INSET Programmes	183,570	183,570	183,570	183,570	183,570	183,570	183,570	183,570	183,570	238,605
TRC running expenses	30,519	13,211	63,147	84,473	105,721	127,633	149,881	98,095	68,355	82,079
	<b>214,089</b>	<b>196,781</b>	<b>246,717</b>	<b>268,043</b>	<b>289,291</b>	<b>311,203</b>	<b>333,451</b>	<b>281,665</b>	<b>251,925</b>	<b>320,685</b>

#### Universities

University enrolment has been projected to increase by 35% for both universities resulting in the creation of about 3,000 additional places in the period 2003 – 2007. A significant increment in recurrent funding to Universities is included between 2001 and 2002 (based on budget estimates for 2002 which show an 18% increase over 2001 expenditure). Thereafter a real increment of 2% per annum has been assumed.

The estimated allocation for University education in 2002 is K6, 553 billion representing 5% of the total education budget. The total allocation to university education for the whole

planning period, 2003 – 2007 will amount to K81, 324 million and averaging K16, 265 million. These costings are in constant Kwacha at 2001 prices.

The existing two universities have a total enrolment of around 9,000 students. There is much pressure to increase the capacities. The university facilities, in particular the student hostel facilities, are in dire need of rehabilitation. They are also over-utilised due to over enrolment and lack of facilities for cooking. The Ministry between the periods 2003-2007 will assist universities to provide around 3,000 additional student places to cater for the increasing demand. It is also assumed that 50% of the new students will be boarders. Houses for teaching staff will be provided at a ratio of 1 house per 32 students. The Ministry will support the rehabilitation works for essential parts of infrastructure and installations at both universities.

## **2.4 Administrative and Support Services**

### **2.4.1 Situational Analysis**

The restructuring of the Ministry has taken longer than expected and this has led to certain problems in improving co-ordination and providing some of the key functions and services of the Ministry. New positions need to be created in line with new demands that have arisen since the restructuring document was prepared. .

Presently, the Planning and Information Directorate in the Ministry of Education is not well co-ordinated with provincial and district offices and the result of this is that the vital statistics on pupils, enrolment rates, drop out rates, teachers, educational materials etc, are not up to date and sometimes not accurate. There is also inadequate, well-trained staff in planning, statistics, and information management at the different levels of the Ministry. However, with the development of EMIS, the situation is improving and many new capacity building initiatives are taking place.

Presently, the flow of information from the Ministry to the community is weak and needs to be strengthened. The staff need to be trained in order to carry out effective analyses, and co-ordinate dissemination of policy guidelines from the Ministry of Education to the public. There is also need to co-ordinate the training and development of human resources and to equip staff with new skills to manage the Human Resource operations of the Ministry.

The standards and evaluation section is not well staffed and most of the standards officers are attached to projects. The section has not carried out frequent field inspections in order to monitor and maintain appropriate educational standards. It has also not been providing frequent professional encouragement, guidance and counselling to teachers through visits to schools as well as arranging in-service training courses.

The Curriculum Development section has also a shortage in staffing levels. As a result of this, the section has not been able to undertake curriculum related research and constantly advise the Ministry on curriculum policy. However, under BESSIP the Curriculum Development Centre has developed the new Basic Education Curriculum Framework and also materials under the Middle Basic Reading Programme. However, school publications such as the Orbit magazine are no longer published due to shortage of staff.

Currently, the teacher education training functions and placement are spread among many departments such as Standards and Curriculum Development, Teacher Education Department and Human Resources Department in the Ministry. This has made accountability difficult and implementation of teacher education programmes less effective . The slow process of putting new teachers on the payroll has also affected the system.

The Ministry, with its limited resources, has not been able to provide full-time education to all learners. It has been supplementing this provision by using distance learning. Part of this has been through interactive radio instruction provided through the Education Broadcasting Services. Also, through its Department of Continuing Education, the Ministry has been providing educational programmes through the National Correspondence College, the open learning centres and training in specific skills in the schools of continuing education.

Continuing and distance education has faced serious problems of under-funding, inadequate trained personnel and insufficient materials for learning and teaching. They have also suffered from unco-ordinated planning. Currently, the University of Zambia provides part of its education degree programmes through distance education.

### 2.4.2 Sub-sector Goals

THEME	WORK PROGRAMMES	GOAL
<b>Access/Equity</b>	<b><i>Distance Education</i></b>	1. Reform and revamp open and distance learning modes of delivery to increase access to quality basic, high school and adult education.
	<b><i>Infrastructure</i></b>	2. Expand the quantity and improve the quality of school and college buildings to meet current and future demands.
<b>Quality</b>	<b><i>Curriculum and Assessment</i></b>	3. Set up minimum education standards and monitor them in government, private and non-formal educational institutions.
	<b><i>Standards and Evaluation</i></b>	4. Provide a relevant and a competency-based curriculum at all levels supported by sufficient and varied learning and teaching resources.
	<b><i>Teacher Education</i></b>	5. Evaluate education quality at all levels by developing assessment schemes that promote effective learning and teaching. 6. Expand and regulate production of professionally competent teachers for the new curricula in line with pupil enrolment growth. 7. Strengthen the functioning of specialised services to improve the quality of education.
<b>Administration, Financing and Management</b>	<b><i>Policy and Planning</i></b>	8. Provide well-planned quality education through co-ordination / monitoring of educational planning activities at all levels, based on reliable data and information.
	<b><i>Special Issues</i></b>	9. Co-ordinate the implementation of programmes targeting Gender/Equity and School Health and Nutrition within Basic, High School and Tertiary sub-sectors.
	<b><i>Human Resource and Administration</i></b>	10. Establish administrative and professional capacity at all levels to ensure equitable and efficient delivery of educational services.
	<b><i>Institutional Development</i></b>	
	<b><i>Financial Management</i></b>	11. Establish and operate a well co-ordinated,

THEME	WORK PROGRAMMES	GOAL
	<b>Procurement</b>	decentralised financial management system that ensures efficient resource mobilization, equitable allocation and accountability.  12. Establish an efficient, accountable and decentralised procurement and distribution system.
<b>HIV/AIDS</b>	<b>Policy and Planning</b>  <b>Special Issues</b>  <b>Human Resource and Administration</b>	13. Co-ordinate HIV/AIDS activities that are mainstreamed through directorates, provinces, districts and institutions.  14. Develop strategies for addressing the impact of HIV/AIDS on the education system based on reliable information and data.  15. Develop policies to support and protect the workforce from HIV/AIDSs, and to replace personnel missing through sickness or death.

*N.B. The specific objectives for each sub-sector can be found in the National Implementation Framework Summary in the Appendices*

### **2.4.3 Strategic Summary**

Implementation of this plan will depend a great deal on the effectiveness of the Ministry's various administrative and support services at Headquarters, provincial, district and school level. It has already been seen in BESSIP that services such as planning and information, accounts, procurement, infrastructure and human resource capacity building can have a positive or negative effect on the success of a programme.

In the restructured Ministry, there will be five main Directorates reporting to the Permanent Secretary, along with key units such as Accounts, Purchasing and Supplies Unit and Audit (see Figure 6). The roles of each directorate are captured clearly in the goals given above and in the objectives (Appendix 3).

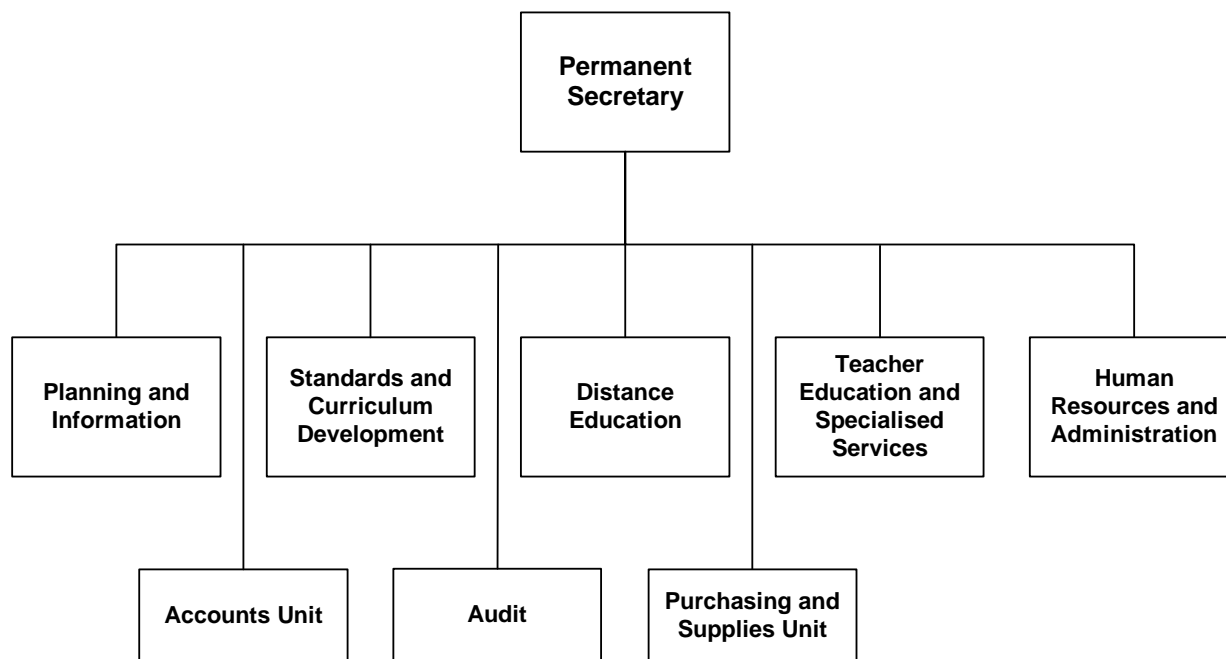
Co-ordination of crosscutting issues such as HIV/AIDS, School Health and Nutrition, Gender and Equity will be carried out within Planning and Information Directorate using designated personnel. Special Units for this purpose will be set up while terms of reference will be developed and designated for each of the special Units. The Directorate of Planning and Information will provide the technical focus to assure good development of policy for the special programmes, quality of programme design and assistance in prioritisation.

The Education Board Services section will now be placed under the Directorate of Planning and Information and will be supported by Accounts Unit in dealing with disbursements to districts and schools.

To counter the problem of poor coordination in the education sector, a National Educational Sector Authority (NESAs) will be established to co-ordinate the activities of all education providers. Membership will come from line ministries, civil society and the private sector. The overall responsibility for it will fall under the Ministry of Education.



**Figure 7 Restructured Ministry of Education**



#### *2.4.3.1 Policy formulation, Planning and Information Management*

In BESSIP, the Ministry demonstrated that it can develop costed work plans effectively and manage the complex finances of a major investment programme competently. However, the challenge now is to absorb the good elements of BESSIP management and accountability into the new Ministry structure.

Policy formulation will be co-ordinated by Planning and Information Directorate, particularly in terms of analysis of and recommendations on current and emerging policies, to enable policy decisions to be taken at top management and Cabinet levels.

Functions of planning and information will be delegated and co-ordinated across the different directorates at headquarters as well as with the provincial and district offices, and education boards. This will also ensure that facilities such as teachers' resource centres and open learning centres are fully utilised for basic, high school, teacher education and adult education.

Fully integrated and properly maintained ICT systems will enable crucial information and updates on the education system to reach planners for policy decisions and implementation schedules. In this regard the Education Management Information System (EMIS) will be fully developed and maintained at all levels of the decentralised system. It will be particularly important in terms of analysing the impact of HIV/AIDS on the workforce in order to come up with key policy and management decisions on the Ministry's human resources.

#### *2.4.3.2 Financial Management*

Improvements to the expenditure planning, management, and tracking systems within the Ministry, will be achieved through a Medium Term Expenditure Framework (MTEF) which is being developed in collaboration with the Ministry of Finance and National Planning and linked to the Poverty Reduction Strategy Paper (PRSP). The Ministry will focus on enhancing financial management capacities as well as the development of more integrated accounting systems running from headquarters through to district level. More delegation of financial authority both within the Ministry headquarters and to provinces, districts and

schools will be made, once these capacities have been developed. This will help to reduce the delays caused by limited authorisation channels.

Procedures for financial disbursements of funds based on institutional annual work plans and budgets will be streamlined in order to speed up spending and implementation of activities.

Operational guidelines for fair allocation of funds to boards, schools and other institutions will be developed and distributed to all levels while monitoring on expenditure will be enhanced. Within the context of decentralisation, community involvement through the Education Boards will be strengthened to monitor utilisation of resources at local levels.

#### *2.4.3.3 Procurement*

The Ministry will develop a more efficient decentralised system for the procurement of the works, supplies and services to support the delivery and management of education at all levels. The Unit at Headquarters will also be improved in terms of capacity and skills. However, decentralised procurement will also require the development and implementation of an audit plan, because initially more problems can be expected in this area.

With respect to textbook provision, the Ministry of Education will encourage the development of a fully liberalised and commercial book sector, which is based on an efficient decentralised procurement system. Within this context, book selection authority will be devolved to schools whilst purchasing authority will be to districts. In addition, to enhance skills in the area of textbook provision, the Ministry of Education will re-organise itself so that textbook provision becomes embedded in the core planning functions of MOE and serviced by a strong information management system.

#### *2.4.3.4 Human Resource*

Under the restructured Ministry, the Directorate of Human Resources and Administration will be responsible for the development and management of the human resource as well as the development of an efficient and effective administrative system, both of which support the operations of the Ministry. An HRD plan has already been developed, and training ,staff development needs and courses have been identified. One priority will be to address the shortage of women in top management positions through access to relevant training.

Under its administration function, the Directorate will also promote and strengthen communications between the Ministry and the community through its public relations activities. It will also be responsible for developing workplace policies on HIV/AIDs in all education institutions. In the implementation of programmes, officers in each Directorate, Province, District and School levels will be designated particular programmes and sub-programmes. The overall responsibility for execution of the Plan will be at top management at national headquarters, province and district. In this regard, change management/training will be a top priority in preparation of the staff for their new responsibilities.

#### *2.4.3.5 Decentralisation and Education Boards*

The decentralised delivery of education services will put much more onus on the provinces, districts, institutions and schools in the next five years in the implementation of the Plan. The Boards form the vanguard of decentralisation, and it is important that they operate efficiently, and with accountability.

Successful decentralisation will depend on the support and empowerment the Boards receive from Headquarters. Education Board Services, which oversees the education

boards at college, school and district level will be based in the Directorate of Planning and Information.

The system of disbursement to boards will be streamlined so that activities are not hampered by lack of funds. Procurement of educational materials in particular will be decentralised to districts and schools. Standards officers will also be provided with transport and funds to enable close monitoring of learning achievement and impact of the programmes.

Major capacity building programmes for all the Education Boards are to be undertaken over the next 5 years in planning and budgeting; managing funds and accounting procedures; procurement procedures; reporting procedures; team-building; and community mobilisation and fund-raising. The Ministry will also need to review the complement of accounting, procurement, and management staff at District level and its own capacity at Headquarters to handle decentralisation from 2003 onwards.

The Provincial Education Offices will assume a new dimension with emphasis on co-ordination of the implementation of programmes and activities, monitoring and supervision of policy and standards as well as ensuring accountability. They will develop provincial training teams to carry out capacity-building and work closely with District Education Boards and the District Education Standards Offices.

#### *2.4.3.6 Standards and Curriculum Development*

Standards Officers will be crucial in monitoring the delivery and impact of the Plan, particularly at District level. In particular, they will be responsible for measuring the overall quality of the system in terms of pedagogical delivery (teachers), management (heads and education boards), and assessment (examinations and continuous assessment). Defined performance benchmarks and evaluation frameworks will be developed in collaboration with the National Assessment Survey, Examinations Council and Education Board Services in order to establish minimum education standards.

Capacity in Curriculum Development will be greatly increased, partly through technical assistance, to handle the implementation of the Basic Education Curriculum Framework, particularly in terms of life skills and HIV/AIDs, and the reform of the high school curriculum. Stronger relationships will be formed with the publishing industry in developing a textbook policy, materials quality control and pricing agreements. Better utilisation will be made of experienced teachers and heads in developing new syllabi.

#### *2.4.3.7 Teacher Education*

The deployment and compensation of teachers is a key factor in the improvement of basic and high school education, particularly the link between Initial Teacher Education and Continuing Professional Development. Teacher Education will work with other stakeholders on improving incentives for teachers to stay in rural areas, and revising the pay structure. In addition, this Directorate has responsibility for expanding Special Education needs provision and also implementing the Early Childhood Care Education and Development initiative.

#### *2.4.3.8 Distance Education*

Open and distance learning provides an important access to basic and high school education for out-of-school children. This Directorate will rehabilitate structures such as the National Correspondence College and improve materials and tutor provision and compensation for open learning centres. It will build on the interactive radio initiative and the

improvement of education broadcasting to expand media support both for informal and formal modes of education delivery and complement the teachers' role. Distance Education will also have the responsibility for developing the adult literacy strategy in collaboration with other stakeholders.

#### 2.4.3.9 Co-ordination with other stakeholders

Much better co-ordination, planning, information-sharing and teamwork will be developed within the Ministry and between Ministry and other stakeholders, including other line Ministries, autonomous institutions, Universities, colleges, schools, provinces, districts, communities and civil society.

### 2.4.4 Cost Projections for Administrative and Support Services

Personal emoluments have historically been taking the largest share of the Government allocation to education. The Ministry plans to address this disparity. The annual salary growth rate will also be sustained at 1.5% in real terms. The restructuring of the Ministry of Education increases the overall salary bill substantially.

**Table 13 Administration and Support Services**

(All costs are in 2001 K million)

Cost Item	Base Estimate		Projections						
	2001	2002	2003	2004	2005	2006	2007	2012	2017
<b>Headquarters</b>	<b>34,293</b>	<b>21,156</b>	<b>28,033</b>	<b>28,186</b>	<b>28,341</b>	<b>28,499</b>	<b>28,659</b>	<b>29,495</b>	<b>30,397</b>
<b>Salaries</b>	4,780	4,780	10,200	10,353	10,508	10,666	10,826	11,663	12,564
<b>Operating expenses:</b>	29,513	16,376	17,833	17,833	17,833	17,833	17,833	17,833	17,833
GRZ Departments	18,165	5,028	6,485	6,485	6,485	6,485	6,485	6,485	6,485
Admin (Fin. M/ment etc)			2,048	2,048	2,048	2,048	2,048	2,048	2,048
Human Resource			1,536	1,536	1,536	1,536	1,536	1,536	1,536
Planning			1,024	1,024	1,024	1,024	1,024	1,024	1,024
Standards			597	597	597	597	597	597	597
Ted & Special Services			1,280	1,280	1,280	1,280	1,280	1,280	1,280
Sector Prog. Admin./ Decent.	11,348	11,348	11,348	11,348	11,348	11,348	11,348	11,348	11,348
<b>Provincial/District</b>	<b>28,521</b>	<b>27,774</b>	<b>50,560</b>	<b>41,760</b>	<b>42,210</b>	<b>42,667</b>	<b>43,131</b>	<b>45,556</b>	<b>48,168</b>
<b>Salaries</b>	20,376	20,376	38,800	30,000	30,450	30,907	31,370	33,795	36,408
<b>Operating expenses:</b>	8,145	7,397	11,760	11,760	11,760	11,760	11,760	11,760	11,760
GRZ**	3,722	2,975	7,338	7,338	7,338	7,338	7,338	7,338	7,338
Provincial			2,816	2,816	2,816	2,816	2,816	2,816	2,816
District			4,522	4,522	4,522	4,522	4,522	4,522	4,522
Sector Prog. Admin./ Decent.	4,422	4,422	4,422	4,422	4,422	4,422	4,422	4,422	4,422

There is an encompassing category in the expenditure projections called 'Other'. This accounts for approximately 1% of total recurrent expenditure and covers: CDC; Skills Training; Adult Literacy; Continuing Education; Grants (Pre-School Association, JETS; Subject Associations; NLS; NSC; TAB; UNESCO; NLS). For the recurrent projections an annual increase of 2% in real terms was applied to this category.

### 2.4.5 Summary of Work Programmes

The Ministry will focus its efforts and financial investment through 12 major programmes to take forward the strategic direction, pursue the goals and achieve the objectives. These programmes consist of a number of sub-programmes and form the basis for ensuring that responsibility and accountability for achievement are clearly allocated. A total of 42 Sub-programmes have been developed within the broad programmes. Of the 12 programmes, 8 will focus on the broad themes of access, quality and HIV/AIDS, while the remaining 4 programmes will focus on administration and support services. All the 12 programmes will have an integral component of monitoring and training.

The programmes and sub-programmes cut across the sub-sectors of Basic Education, High School Education, Tertiary Education and also Administrative and Support Services :

WORK PROGRAMMES	DESCRIPTION
<p><b>1. Policy and Planning Sub-Programmes</b>            Policy Analysis            Planning, Research and Monitoring            Integrated Information Management            Budget and Projects            IT in Learning Institutions            Education Board Services            Bursaries</p>	<p>The Planning and Policy programme will aim at co-ordination and management of the sector strategy with specific focus on ensuring that the Ministry is on course in its the set goals. This programme will also be the locus of innovation through systematic policy research and review, while harnessing the vast potential of information technology. The programme will be 'housed' in the Planning and Information Directorate and will ensure that effective linkages between programmes, sub-programme, Directorates and all levels of education delivery are well defined and maintained.</p>
<p><b>2. Infrastructure Sub-Programmes</b>            Construction            Rehabilitation            Maintenance</p>	<p>This programme places importance on expansion of access through the provision of acceptable and appropriate infrastructure to communities within easy access. It will utilise various modalities and methods of cost effective construction and rehabilitation. to ensure that teaching and learning takes place in a safe and healthy atmosphere.</p>
<p><b>3. Special Issues Sub-Programmes</b>            HIV/AIDS            Gender and Equity            School Health and Nutrition            Special Needs</p>	<p>The primary aim of the special issues programme is to respond appropriately to challenges facing the Ministry at a given time. Specifically this covers areas such as HIV/AIDS, gender and equity, SEN, SHN. It will ensure that these and other issues are co-ordinated and integrated across all strategic programmes. This programme will be come under the Director of Planning and Information.</p>
<p><b>4. Teacher Education Sub-Programmes</b>            Initial Teacher Training            Continuous Professional Development            Specialised Services</p>	<p>The Teacher Education Programme will focus primarily on two fronts: Firstly it will ensure that teacher supply needs are met in line with the articulated strategic policy options and goals; secondly it will ensure that the serving teachers have their pedagogical and content skills upgraded as often as possible in order to improve their individual performance and that of the system. The Teacher Education Directorate will coordinate the programme.</p>
<p><b>5. Standards and Evaluation Sub-Programmes</b>            Standards and Evaluation            Accreditation</p>	<p>This programme will ensure that the quality of education delivery meets the targets of the Sector Plan by monitoring the learning achievement and acquisition of appropriate life and social skills by pupils. It will support curriculum delivery in schools and as well as school management. It will also co-ordinate closely with the Teacher Education Programme by giving immediate feedback on what</p>

	<p>approaches are working and where changes are needed to improve the delivery of the curriculum. It will further assist in identifying areas that need curriculum and methodological reform. The Programme will be in the Standards and Curriculum Directorate.</p>
<p><b>6. Curriculum and Assessment` Sub-Programmes</b> Curriculum Development Education materials Examinations and Assessment</p>	<p>This programme will focus on ensuring that the curriculum is regularly reviewed and updated to meet the challenges and expectations of the Sector Plan. It will also ensure that quality and relevant education is provided to all learners, which will enable them to exploit their personal potential and contribute to national development. The Programme will be an inherent component of the Standards and Curriculum Directorate</p>
<p><b>7. Distance Education Sub-Programmes</b> Open and Distance Learning Adult Literacy</p>	<p>This programme will be extremely important in developing alternative approaches to in-service, upgrading and general delivery of education by harnessing modern approaches and technology while being cost effective. It will also broaden access to a wider range of learners for whom access to more formal places of learning and specialised subjects is either impractical by virtue of location or high cost to both the learner and the education system. This programme will be managed by the Directorate of Distance Education.</p>
<p><b>8. University</b></p>	<p>This programme underpins the importance of Universities to national development through various academic and research activities. It also focuses on developing the quality of higher education and greater access to enable more learners attain the higher-level skills relevant to the developmental needs of the country.</p>
<p><b>9. Human Resource and Administration Sub-Programmes</b> Human Resource Policy and Management Human Resource Training and Development Human Resource Recruitment and Deployment Legislation Administration</p>	<p>This programme focuses on ensuring that the Ministry recruits, retains and upgrades the performance levels of its employees through a variety of approaches ranging from on-the-job training to medium/longer term courses. It will also ensure that clear career paths are defined while at the same time providing guidance and policy direction on issues of career development and management. This programme will also ensure that adequate human resource is deployed at all levels as the functions of the Ministry are decentralized. The programme will come under the Directorate of Human Resources and Administration.</p>
<p><b>10. Financial Management and Accounting Sub-Programmes</b> Budget Management Financial Management Resource Mobilisation Audit</p>	<p>This programme will undertake to ensure that resources are mobilised and judiciously managed in line with agreed modalities through transparent processes and strong financial guidelines. Through this process the Ministry will endeavour to maintain the highest standards of accountability of resources for delivery of services, so that the learners benefit to the maximum. This Programme will overarch the Permanent Secretary's office and the Accountants and Audit sections of the Ministry.</p>
<p><b>11. Procurement Sub-Programmes</b> Material Supplies Services Capital Projects</p>	<p>This programme ensures that the acquisition of goods, works and services balances the need for effectiveness of supply with efficiency of delivery to meet user needs, while maintaining transparency and achieving value for money.</p>

<p><b>12. Institutional Management Sub-Programmes</b>  Strategic Management  Institutional Development  Management of Change  Public Relations</p>	<p>This will provide the overall framework within which the sector and the Ministry will function. It will be part of the Permanent Secretary's office.</p>
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In addition, three sub-programmes will be developed to facilitate the management and institutional change necessary for the implementation of the Strategic Plan. These will be *Strategic Plan Management, Institutional Development Management of Change, and Public Relations*. These sub-programmes will be based in the Office of the Permanent Secretary for a defined period, after which they will be shifted to their respective Directorates.

A detailed description of the Programmes, Sub-programmes and activities will be developed in a five-year Strategic Implementation Framework.

#### **2.4.5.1 Management and Monitoring of the Programmes**

The management, planning, implementation and monitoring of the Strategic Plan will be based in the new Directorates and functions of the restructured Ministry. In particular, the newly formed Education Boards at all levels will play an increasingly important role in managing and implementing the delivery of education services. To enable the strategic vision to be realised and the goals and objectives to be achieved, the Ministry will:

- a) adopt a consistent and systematic approach to planning, implementation and monitoring based on annual work plans and budgets for the strategic programmes and sub-programmes;
- b) allocate responsibility and accountability to Directors, Heads of Departments and Units, and also to Provincial, District and School levels where applicable.

The Ministry headquarters will have the responsibility of policy formulation and interpretation, as well as overall supervision of the programmes. The Provincial Education Offices will have the function of co-ordination and monitoring the programmes and activities. Planning and implementation of the programmes and activities will rest with the Education Boards at district and institution levels.

#### **2.4.5.2 Management and implementation levels and functions**

Overall responsibility for ensuring the successful execution of the Plan will rest with the *Top Management Team* chaired by the Permanent Secretary. The supervision and monitoring of the implementation will be carried out by the *Senior Management Team* chaired by the Director of Planning and Information on the headquarters level, by the Provincial Education Officer on the provincial level and by the District Board Secretary on the district level.

The planning and reporting of the programmes and activities will rest with the *Middle Management Teams* on their respective levels. Implementation of the activities will be done by the Education Boards, officers and teachers throughout the system.

Each of the major programmes will be allocated to specific HQ Directors or Heads of Units. Sub-programmes will be the responsibility of senior management officials in the Ministry. Education Boards at the various levels will also have responsibilities for the management, planning and implementation of the activities within the sub-programmes.

### *Top Management Team*

The team will comprise of the Permanent Secretary, Directors, Chief Accountant and Chief Purchasing and Supplies Officer and meet on a bi-weekly basis. Provincial Education Officers will be included in the meetings on a monthly basis. The specific functions of the team are as follows:

- Policy formulation and influence;
- Strategic direction;
- Resource mobilisation;
- Lobbying and advocacy;
- Representation with relevant stakeholders;
- Donor liaison;
- Management of change;
- Approval of Annual Work Plans and Budgets;
- Overall policy interpretation.

### *Senior Management Team*

The team will comprise of the Directors and heads of sections and units at all relevant levels and will meet on a monthly basis. The specific functions of the teams are as follows:

- Policy analysis and interpretation;
- Input / output analysis and co-ordination;
- Programme planning development;
- Co-ordinating and refining annual work plans;
- Monitoring and reporting;
- Management of change;
- Budgeting process;
- Ensure coherence of programmes and sub-programmes;
- Dissemination of information.

### *Middle Management*

Middle management will comprise of Principal and Senior Officers at the respective levels and will meet on a monthly basis. The specific functions of the teams are as follows:

- Planning of activities within the sub-programmes;
- Monitoring, reporting and feedback.

### *Operational*

The operational level will include those officers, education board members and teachers in the frontline of delivering educational services at all levels. The main function of this group will be the implementation of the activities and feedback.



#### **2.4.6 National Implementation Framework**

The framework will function as a five-year plan for all the programmes and activities, including roles, functions and responsibilities for the management of the plan at all levels.

The format for the implementation framework will be based on the sub-sectors and will define:

- Roles, functions and responsibilities at all levels;
- Indicators and targets;
- Overall activities within the goals and objectives for each sub-sector;
- Time line;
- Implementation levels;
- Overall budget.

The development of the framework will involve inputs from officers at the level of education boards, districts, provinces and the headquarters.

#### **2.4.7 Financing Modalities**

The Five Year Strategic Plan adopts the principle of an integrated sector-wide approach to the development of the education sector, as opposed to the current fragmented strategy based on a specific sub-sector. The proposals for funding the Plan are based on the modalities employed in BESSIP, and the need for harmonisation with government financial systems. They will also help to reduce transaction costs by avoiding a multiplicity of donor –managed programmes and accounts.

The sector plan will mainly be financed by the government and its co-operating partners with the formers' allocation being approximately three quarters and the latter' one-quarter. Although government will be progressively increasing allocation to the education sector, it is expected that communities will continue to support schools and institutions of learning in various ways. Of note in this regard is the significant community support expected in the area of school construction, rehabilitation and maintenance.

The funding modalities have been developed with the aim of standardizing the operational mechanism for the Ministry, while maintaining transparency and accountability principles. Furthermore, this will lead to the development of sustainable financial management capacity within MoE. Co-operating partners will disburse funding directly to the Ministry under three different modalities. The three different modalities are illustrated below:

##### **2.4.7.1 Direct Sector Support Fund**

Under this arrangement, contributions from co-operating partners will be channeled directly to MoE and deposited in a common bank account, under the control and management of MoE. The funds will be used towards approved activities identified for the *whole sector*. Each level, namely basic, high school and/or the tertiary sub sectors, can all be beneficiaries of the pooled funds. Funds will be allocated as defined in the AWPB and guided by the National Implementation Framework and the strategic priorities of the MOESP. The format of the AWPB will specify the allocations by sub-sector and by source.

#### **2.4.7.2 Designated Support Funds**

Funds from co-operating partners will be channelled to MoE and deposited in separate donor designated bank accounts under the control and management of MoE. Funds will be allocated according to prioritised requirements and bilateral donor agreements with MoE. In addition, the allocation of funds to each sub-sector or specific activities will be defined in the AWPB as guided by the National Implementation Framework.

#### **2.4.7.3 Other Funding**

In recognition of existing bilateral agreements, partners involved in project funding will continue within the stipulations of these agreements. These funds will be deposited in separate bank accounts under the control and management of the donor agency. Following the end of these projects, any new agreements should undertake to meet MoE preferences for one of the cases described above. The partners will also be required to make full returns and reports to MoE on project funding in order to ensure the sector status is captured in full.

#### **2.4.8 Management of Funds: Integrated Accounting Systems**

The shift to direct sector support will be complemented by the integration of the accounting functions at the Ministry. This will focus on the development and management of joint or integrated systems at the Ministry. MoE currently uses two accounting systems, the Financial Management System (FMS) to capture expenditure GRZ funds and the Sun system to capture donor expenditures for Case 1, 2 and 3 of BESSIP. The Ministry of Education Accounting Unit will have the overall responsibility of GRZ and external funds disbursed to the Ministry. As a transitional arrangement the BESSIP Accounting Unit will continue to function in the first year until it is subsumed within the MoE Accounting Unit.

All funds of the Sector Plan will be managed under a common Integrated Financial Management Information System (IFMIS). IFMIS is an initiative by Government to improve resource, allocation and utilization. It is also intended to improve accountability and transparency in the use of funds. MoE will be a pilot Ministry in the implementation process of this information system.

The integration of the accounting systems will result in the development of common reporting and financial management information system. Progress and Financial reports from the Provinces and Boards will be submitted through the respective institutional arrangements on a monthly basis. These reports will be compiled into integrated annual reports at national level.

#### **2.4.9 Release of Funds by co-operating partners**

Co-operating partners will release funds under mutually defined criteria and agreements between the MoE/GRZ and the Cooperating Partners. The following explains what triggers will effect the release of funds by the CPs' to MoE:

*Initial deposits by the CPs to the MoE will be based on:*

- (i) Existence and approval of Annual Work Plans and Budgets for the year under consideration;
- (ii) Agreed financial commitment by government amounting to at least 20.5% of the discretionary budget

- (iii) Existence of an agreed quarterly disbursement forecast.

*Subsequent replenishment on a quarterly basis by the CPs to MoE will depend on:*

- (i) Approved Quarterly Progress and Financial Reports (including expenditure reports, cash flow statement and cash forecast) with progress measured against targeted performance indicators as laid down in the Strategic Plan;
- (ii) Formal request for the release of funds by MoE and copied to Ministry of Finance and National Planning.

#### **2.4.10 Resource Allocations**

##### *Activity based allocation*

Resources will be allocated to defined levels of delivery through an activity based budgeting process. This will involve engaging the implementers in developing activities in order to meet the Ministry agreed objectives within the broad framework of the sector strategy.

##### *General resource allocation criteria*

The Ministry will also use objective allocation criteria and funding formula that takes into account various factors such as disadvantaged groups (e.g. girls and orphans), isolated schools/districts, and actual enrolments of pupils. This will ensure that there is a fairer and more equitable allocation criteria for the scarce resources. The allocation criteria will have to be piloted, and tested before final implementation.

#### **2.4.11 Annual Work Plans and Budgets**

All activities will be incorporated into annual work plans and budgets at HQ, Province, Board and autonomous institution levels following the national implementation framework. Annual work plans will be function-based according to the organisational functions, i.e. Directorate, Unit or other statutory groups. Therefore, the National Implementation Framework, which is based on the sub-sectors, will be used in developing the activities according to the functional areas within the restructured Ministry. In order to ensure the co-ordination and monitoring of the sub-sectors, responsibilities will be assigned to relevant sections and individuals.

The planning process will be bottom up with District Education Boards planning their annual work plans with inputs from the schools. These will be consolidated at the provincial level after which further consolidation will be done at the national level.

Annual work plans and budgets will exist for each level for the Education Boards, Provincial Education Offices and Headquarters. An overall National Annual Work Plan and Budget will be produced incorporating all work plans from the various levels.

The format for the annual work plans and budgets will be based on the Directorates and will define:

- Indicators and targets;
- Specific activities within the annual objectives;
- Time line;
- Responsibilities.

The planning cycle for the development of the annual work plans will be as follows:

- Development of Education Boards draft work plans and budgets with inputs from the schools, resource centres, etc. – *District or Institutional level*;
- Development of Provincial draft work plans and budgets with the participation of the Education Board Secretaries - *Provincial level*;
- Development of National draft work plans and budgets with the participation of the Provincial Education Officers – *National level*;
- Approval of the work plans and budget for each administrative level – *National level*.

Ministry annual work plans and budgets will provide the basis for budgetary requests to the Ministry of Finance and National Planning and human resource requests, where required, to the Cabinet Office. Financial and Human Resource allocations will then be compared against annual plans, which will be adjusted accordingly.

This implementation and planning process is illustrated in Figure 7.

#### **2.4.12 Monitoring and Evaluation**

Monitoring of the progress and impact of the Strategic Plan will be done on a regular basis using various methods. This will include following the indicators and targets defined in the five-year National Implementation Framework and the annual work plans. The regular meetings of the top, senior and middle management will function to ensure the implementation of the monitoring activities on a day-to-day basis.

Monitoring will also be carried out as the main functions of the Provincial Education Offices, the District Education Boards and the District Standards Offices. In addition, respective Directorates, Sections and Units of the headquarters will also carry out monitoring as part of their regular functions.

Each Directorate and Unit on the national level and each Provincial Education Office and Education Board on the lower levels will produce quarterly reports. The reports will include, details of progress, financial expenditure and actions to be taken forward. The quarterly reports will form the basis of *Internal Quarterly Reviews*, which will be held on the Provincial and National levels.

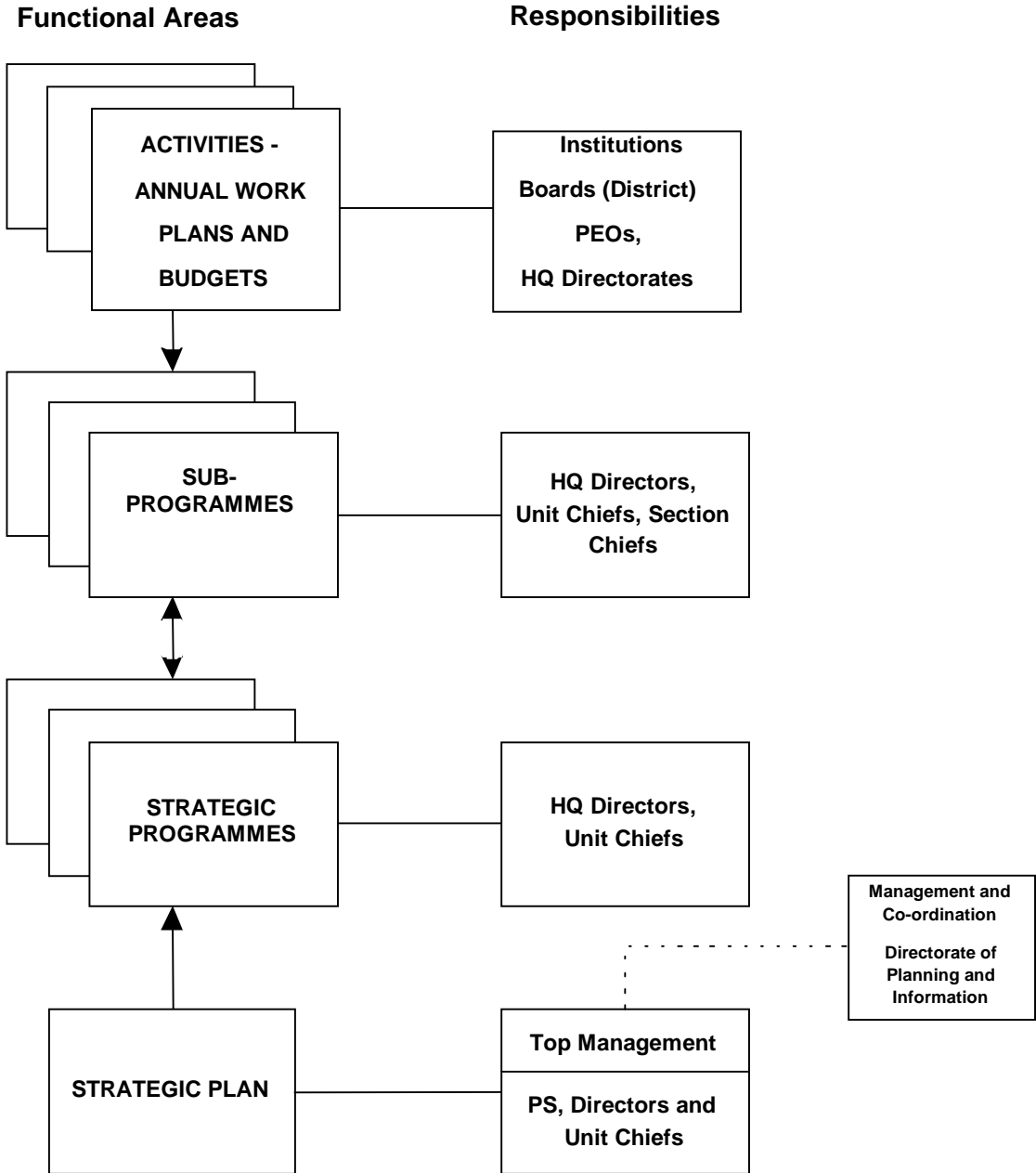
The results of each annual work plan will be produced into Annual Reports at all levels and the overall progress will be tracked against the objectives, indicators and targets. The reports will be presented at an *Internal Annual Review* with participants from all levels. Following the review these reports will be consolidated into a Ministry of Education Annual Report.

Joint donor/MoE monitoring will take the following forms:

- Quarterly Progress and Financial Reports presented to the Strategic Planning Consultative Committee.
- Annual MOESP progress and financial reports covering performance against the Annual Workplan, and progress in achieving targets and expenditure against the budget of the previous year. These will be presented at the Joint Annual External Review at the end of the calendar year.
- Annual Workplans and Budgets provided at the same Review for approval for the following year.
- Annual Independent Audit Report through the Auditor General's office

A Mid-Term Evaluation will be carried out in the third year of the Strategic Plan. This evaluation will include an impact assessment of the progress of the plan against the overall goals, sub-sector goals and objectives.

**Figure 7 Implementation Process**



### **3. Financing of Strategic Programmes**

#### **3.1 Introduction**

This section summarises all the projected expenditure presented in the previous chapters. It further details the resource projections and the funding gaps. Expenditure projections have been arrived at by using agreed cost drivers in pursuit of the set Ministry targets. The costings have been done both in constant prices and current prices. For ease of comparison, constant prices will be used most often. The funding gap was arrived at by comparing the actual projected costs of the programme and the resource envelope. The resource envelope was determined by the government-projected allocation to education based on the current trends and commitments already made by co-operating partners during the planning period.

#### **3.2. Financing the Sector Plan**

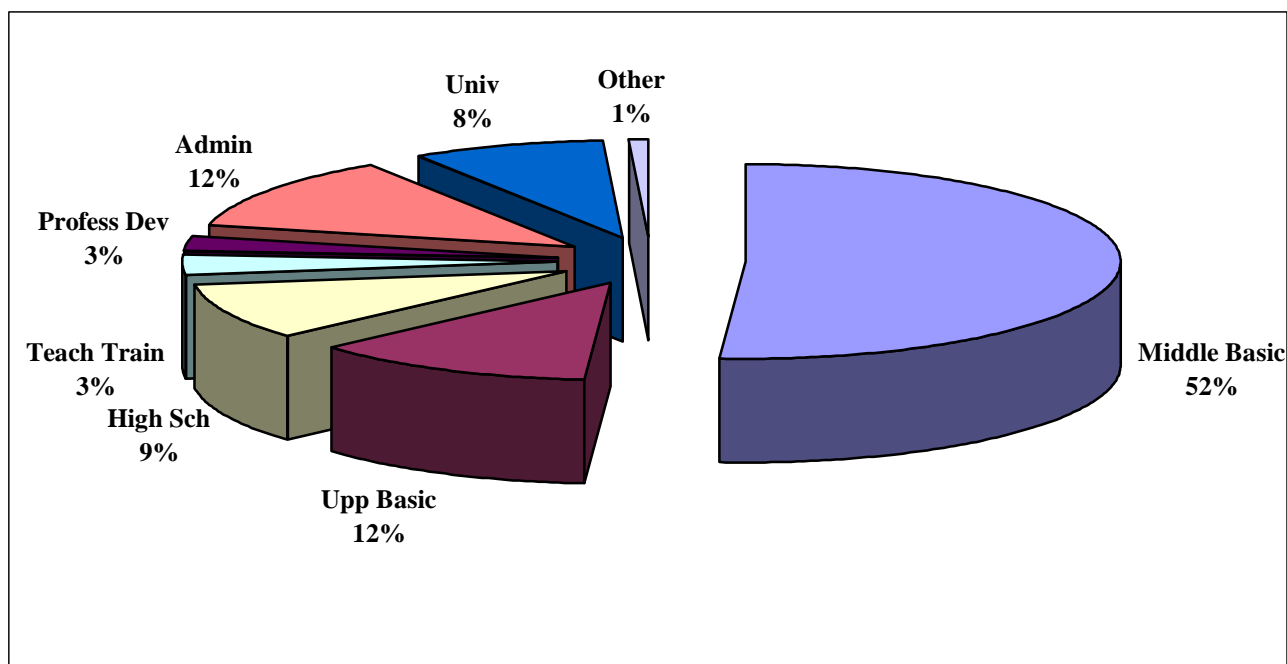
The total budget for the strategy period covering all critical areas of the sector is K5, 249,399 million of which K3, 735,465 million representing 71% will be financed from domestic resources. The remaining amount of K1, 513,934 million (29%) is expected to be externally financed through grants and loans. Domestic resources projections are based on the previous 7 years funding trends and commitments while external funding is only based on the pledges already made. There is a stronger possibility that both Government and its co-operating partners might allocate higher amounts than what was used to make the projections. This is plausible in the sense that Zambia's public resource allocation to education is among the very least in Sub-Sahara Africa, and there are positive signs that the government will progressively increase allocation to education in line with the sub-regional and international practices.

The total resource allocation has been disaggregated by year, programme and sub-sector for both recurrent and capital components. Although the Ministry's preferred mode of funding is that of sector pooling as reflected in the memorandum of understanding, external funding will only be allocated to mutually agreed areas based on the Ministry's outlined priorities.

#### **Recurrent Expenditure Allocation**

The total recurrent expenditure projected for the sector plan for the period of 2003 – 2007 will be 3,847,931,000,000 ZMK at 2001 constant prices, and 52% of which will go to the middle basic level. while the upper basic level will as well get 12%. High school will get 9%, university 8% while professional development and teacher education will receive 3% each. Administration at all levels will get 12% Although these projections have been made based on past GRZ financing practices and co-operating partner pledges of 2002, there might either be negative or positive shifts in the overall available resources.

**Table 14 Recurrent Costs (2003 - 2007)**



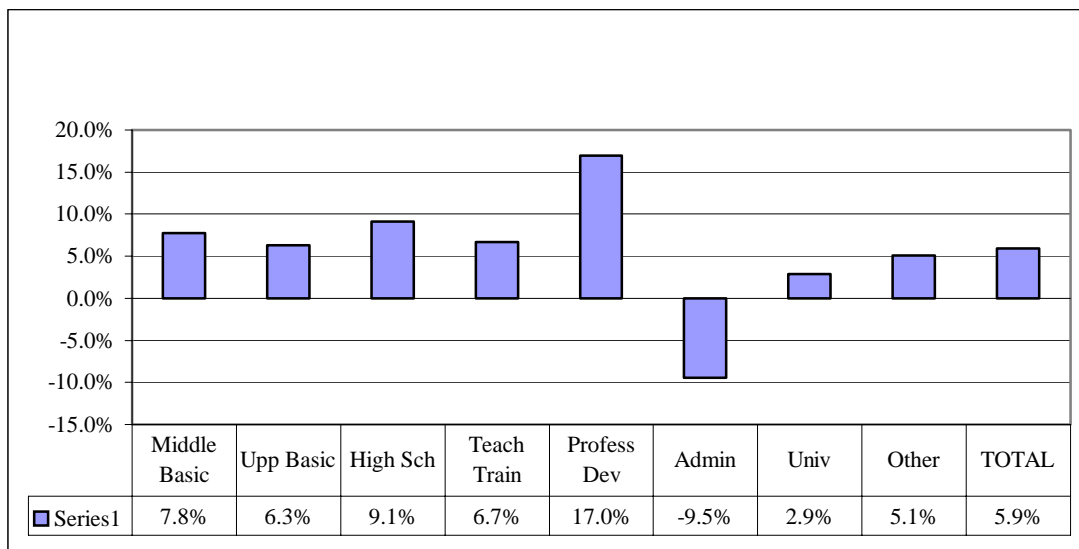
The overall expenditure by level has been projected to increase in all sub-sectors in real terms. However the projected proportionate increases will vary between the two time-periods (2003 and 2007) across sectors due to two main factors:

- Major policy shifts to address demands of the time; and
- Past practices that led to the creation of a backlog in some critical areas

The declaration of free Middle Basic Education (Grade 1 to 7) in 2002 placed on the central Government imperative financial obligations such as the provision of adequate teaching and learning requisites to all schools as well as the expansion of education infrastructure. This will subsequently increase demand at the upper basic level. The sharing of facilities between middle basic and upper basic might reduce the resulting investment pressure at the upper basic.

The growth in allocations by sub-sector are based on the macro-economic projection assumptions that places the average GDP growth rate at 4% to 5% during the sector plan period, and further assumes that allocation to education would remain constant or only change upwards to get to the levels of international norms. It should further be noted that the reflected financing gap could significantly be reduced if allocations to education were raised to the sub-regional average levels.

**Figure 8 Recurrent and Capital Costs Changes Between 2003 and 2007**



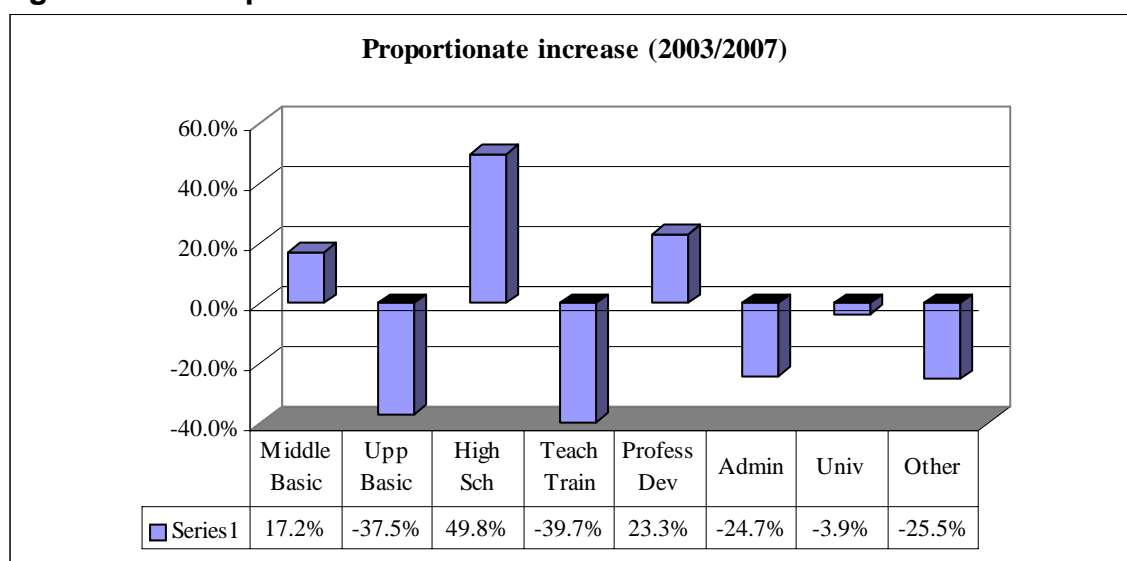
**Changes in Resource Allocation by sub-sector**

It is projected that allocation to all the sub-sectors being covered by the Ministry of Education, with the exception of administration will increase in real terms by 5.9% on the average between 2003 and 2007 with the highest (17.0%) being in professional teacher development. This reflects the emphasis now being placed on quality. The next highest increase will be high school followed by middle basic.

**Changes in Proportionate Allocation by sub-sector**

There will be major proportionate shifts of allocations between the same periods across sectors with the highest shifts being at middle basic and high school levels by 17.2% and 49% in the positive respectively, while professional teacher development will have a 23.3% positive change. On the other hand, teacher training will have a negative shift of 39.7% as from this year a surplus of teachers will be produced. The upper basic and administration/support sectors will also experience major reductions in the proportionate allocations of 37.5% and 24.7% respectively. Investments in middle basic affect upper basic positively, especially in infrastructure developments, as they will be in the same location. The proportion going to university education will shift marginally by 3.9% in the negative.

**Figure 9 Proportionate Increase Between 2003 and 2007**





## Summary of Cost Projections for Major Recurrent Costs

The chronic under-funding of the education sector in past 12 years led to major funding shifts resulting in reduced allocation of resources to the non-salary related recurrent expenditures. This greatly contributed to undermining the quality of education provision especially at the middle basic, upper basic and high school levels. Salaries actually assumed the status of “non discretionary” funding. In 2001, 70.6% of the recurrent expenditure went to salaries while only 6.3% was spent on teaching and learning supplies for the middle basic level. The picture was somewhat similar for the upper basic with 66.2% being devoted to salaries and 1.7% to teaching and learning materials. While 54.6% of the recurrent budget was spent on salaries for high schools, available expenditure distribution indicate that there were no public funds spent on teaching and learning materials for high schools.

The sector strategy shows investments projections in education materials that will shift recurrent expenditure allocation proportions from the 2001 baseline so that other critical areas that enhance quality such as the provision of teaching and learning materials are not neglected. . The proportion of personal emoluments for the middle basic level will reduce to 50.2% while that of education materials will increase by 2.6 times to 16.2%. The same pattern has been projected for upper basic where the proportion of personal emoluments will reduce to 56.3% while allocation to teaching and learning materials has been projected to increase by 3.4 times to 5.7%. At high school, the proportion of personal emoluments will be reduced to 48.2% while allocation to teaching and learning materials will be increased from almost nothing to about 3%.

Another critical area under major recurrent expenditures where shifts are expected is for special programmes that cover HIV/AIDs, equity and gender, school health and nutrition, bursaries for the vulnerable groups and children with special needs. It is projected that expenditures for special programmes from the 2001 figures will approximately increase by 2 times at middle basic, 3 times at upper basic and 22 times for high schools respectively. It is also worth noting that the shift in the proportions of the major recurrent expenditure in the area of teaching and learning materials including special programmes are to be effected at the commencement of the sector plan in 2003 and sustained thereafter.

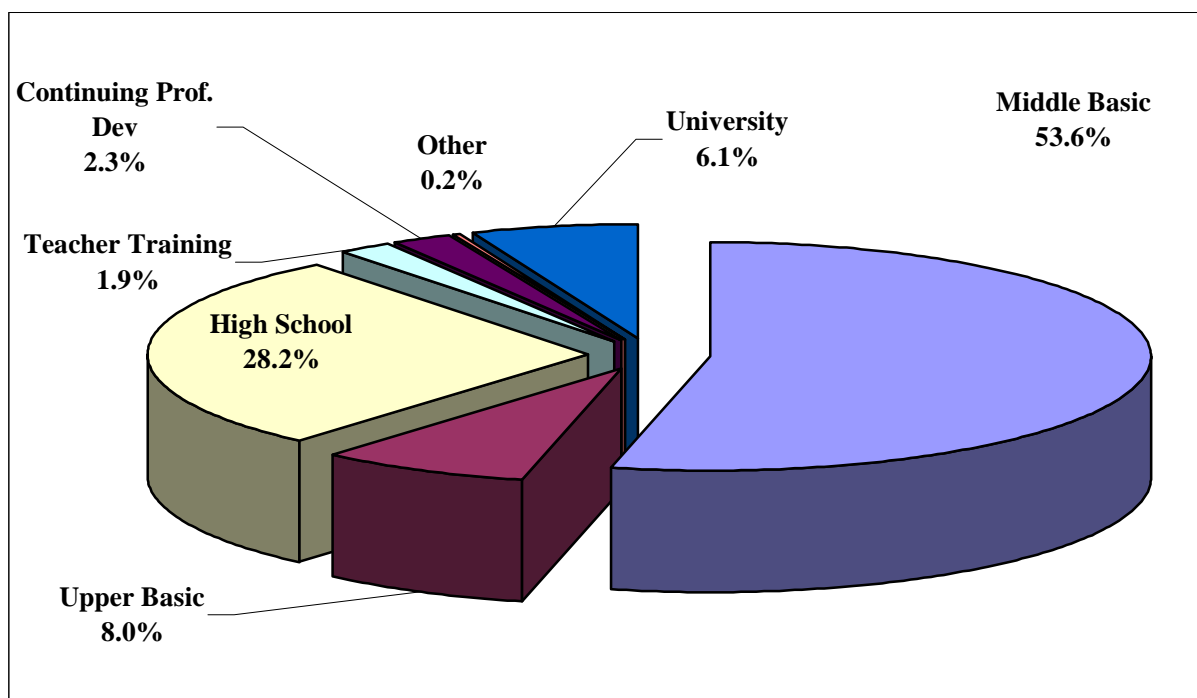
**Table 15 Recurrent Cost Projections in Millions of Kwacha at 2001 Constant Prices**

	2001	2002	2003	2004	2005	2006	2007	Total
Middle Basic	193,730	239,790	281,257	291,508	303,914	317,578	335,928	<b>1,963,705</b>
Upper Basic	51,367	63,980	68,010	69,597	71,944	74,070	76,916	<b>475,884</b>
High School	36,977	45,305	49,966	52,435	55,978	58,263	60,780	<b>359,704</b>
Teacher Training	15,459	17,818	17,862	17,907	18,428	19,190	20,195	<b>126,859</b>
Profess Dev	10,580	10,493	13,380	14,664	15,921	17,105	18,270	<b>100,413</b>
Administration	62,814	48,930	78,593	69,946	70,551	71,166	71,789	<b>473,789</b>
University	37,504	44,100	44,982	45,882	46,799	47,735	48,690	<b>315,692</b>
Other	4,363	4,363	4,450	4,539	4,630	4,723	4,817	<b>31,885</b>
<b>TOT RECURRENT</b>	<b>412,794</b>	<b>474,779</b>	<b>558,500</b>	<b>566,478</b>	<b>588,165</b>	<b>609,830</b>	<b>637,385</b>	<b>3,847,931</b>

### Capital Allocation

On the overall the middle basic level will have the highest capital allocation of approximately 53.6% spread across the five-year period followed by high school. Although the upper basic allocation of 8% appears to be small, this level will also directly benefit from the capital investments that will be made at middle basic schools, as they will be upgraded to the status of upper basic.

**Figure 10 Capital Allocation by Sub-sector**



Although Universities are given direct grants for use at their discretion, it has been felt prudent that of the resources available for infrastructure to the Ministry, 6% should be allocated to the Great East Road Campus and the Copperbelt Universities for civil works under the Directorate of Planning and Information within the infrastructure programme. The proportions will be determined in consultations with the two Universities.

**Table 16 Annual Capital Allocation in Millions of Kwacha at 2001 Constant Prices**

	2001	2002	2003	2004	2005	2006	2007	Total
Middle Basic	21,366	57,286	71,555	178,888	239,592	178,888	46,628	794,202
Upper Basic	36,777	24,269	10,346	25,864	34,641	25,864	6,742	164,503
High School	5,425	29,008	37,662	94,156	115,039	94,156	35,610	411,056
Teacher Training	8,488	14,405	2,588	6,471	8,636	6,471	1,718	48,777
Profess Dev	-	2,479	3,053	7,632	10,684	7,632	1,526	33,005
Administration	-	-	-	-	-	-	-	-
University	-	6,553	8,132	20,331	26,523	20,331	6,007	87,877
Other	-	-	229	572	800	572	114	2,287
<b>Total Capital</b>	<b>72,056</b>	<b>134,000</b>	<b>133,565</b>	<b>333,913</b>	<b>435,916</b>	<b>333,913</b>	<b>98,345</b>	<b>1,541,707</b>

### 3.4 Funding gap analysis (million Kwacha)

The financing gap varies substantially from year to year, with the largest gap being in the middle years. This is due to the planned pattern of construction activities. This calls for an increase in flexibility on the part of the external partners so that their support is weighted more heavily to the middle years. If more pledges for funding are made by external co-operating partners, and if GRZ increases its allocation to education, the financing gap is bound to be reduced significantly or altogether eliminated.

It is estimated that the total funding gap for the five year period is 884,195 million ZMK with an annual gap of K155,872 million.

**Table 17 Funding Gap Analysis (Million Kwacha, Current Prices)**

	Actual	Estimate	Projected					Total
	2001	2002	2003	2004	2005	2006	2007	2003-07
<b>Expenditure</b>	484,850	713,519	899,551	1,244,067	1,471,567	1,396,807	1,121,602	6,133,595
<i>Recurrent</i>	412,794	556,465	725,942	782,701	845,172	902,592	971,678	4,228,085
<i>Capital</i>	72,056	157,054	173,609	461,366	626,395	494,215	149,924	1,905,509
<b>Resources</b>	484,850	662,480	858,647	1,031,010	1,055,705	1,118,537	1,185,499	5,249,399
<i>Domestic</i>	353,472	464,000	601,047	699,442	756,516	810,380	868,079	3,735,465
<i>External</i>	131,377	198,480	257,600	331,568	299,189	308,157	317,420	1,513,934
<b>Funding Gap</b>	<b>0</b>	<b>51,039</b>	<b>40,904</b>	<b>213,057</b>	<b>415,862</b>	<b>278,270</b>	<b>(63,897)</b>	<b>884,195</b>
<b>Funding Gap (US\$ 000,000)</b>	<b>0.0</b>	<b>12.3</b>	<b>8.9</b>	<b>43.7</b>	<b>82.0</b>	<b>53.3</b>	<b>-11.9</b>	<b>176</b>

\* 'Other' includes: Curriculum, Skills training; Adult Literacy; Continuing Education; Grants(Pre-school association, JETS, Subject Ass., NSC, TAB, UNESCO, NLS);

#### Memo Item

GDP Deflator  
2001=100)

<b>100</b>	<b>117</b>	<b>130</b>	<b>138</b>	<b>144</b>	<b>148</b>	<b>152</b>
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As can be noted in the table above, the sector plan is organised in such a way that there will be more investments in the middle third period than the other two-third periods of the beginning and ending. Initial efforts will also focus on capacity building and will accelerate speedily to clear the backlog leading to the achievement of most of the set targets.

#### Financing the Annual Work Plans and Budget

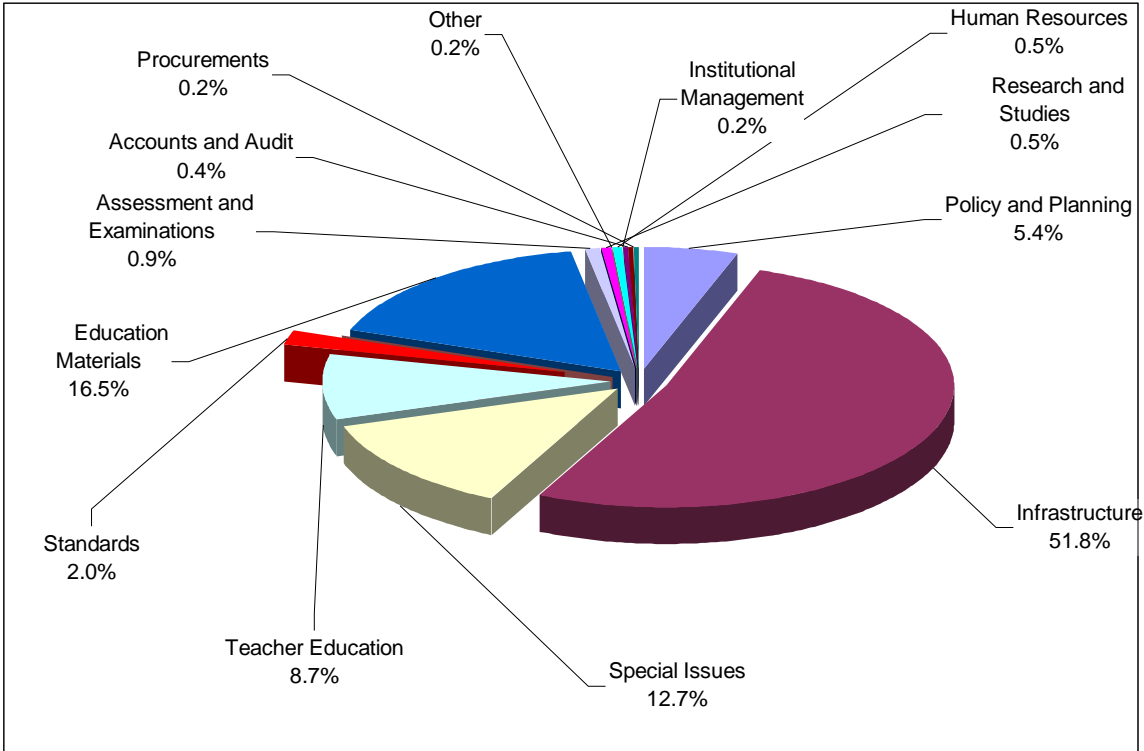
The AWPB will be financed by the Ministry and its co-operating partners on an annual basis within the broad framework of the National Education Sector Implementation Framework. Three quarters of the budget will be financed from domestic resources while the other quarter will be financed from external funding through grants and loans. The sector wide allocation to education from domestic will be within the context of the Poverty Reduction Strategy and the Transition National Development Plan.

Personal emoluments of the teaching and non-teaching staff will be financed from domestic resources based on the establishment registered in the restructured Ministry for which Treasury authority has been given. Personal emoluments also include other expenditure items such as travel on leave, long service bonus, pension/NAPSA contributions and housing allowances. (The latter is only for officers who did not benefit from the sale of GRZ pool houses, council houses, or obtained a loan to build/ purchase a house, and are not staying in an institutional house). Personal emoluments also include other salary related allowances such as retention allowance, double shift allowance, extra duty allowance, and rural hardship allowance.

For the 2003 personal emolument budget, the September 2002 payroll was used side by side with the restructuring document in order to ensure that positions not appearing in the restructuring document are not omitted on 2003 payroll, as they will not have been laid off completely.

External financing will mainly be targeted towards the agreed 12 priority programmes<sup>3</sup> within the sector plan. About half (51.8%) of external funding will be allocated to infrastructure programmes, followed by education materials with 16.5%, while special issues (School Health and Nutrition, HIV/AIDS, and Gender and Equity) will take 12.7%. Further, of the total infrastructure budget, 53.6% will be allocated to the middle basic level as already illustrated under capital allocation.

**Figure 11 Distribution of External Resources Across Priority 12 Programmes**



The AWPB will be developed every year prior to the year of implementation following an elaborate process being developed by the Directorate of Planning and Information taking the form of rolling plans based on past experience with inputs from all levels of implementation and stakeholders.

**Table 18 Summary of Milestone Targets**

3.3 Rates and Ratios	Baseline 2001		Target 2007	
	Indicator	Absolute number	Indicator	Absolute number
3.4				
Completion Rate (Grades 1 – 7)	64	1,810,864	86%	2,302,386
Completion Rate (Grades 8 – 9)	41%	197,017	59%	325,581
Completion Rate (Grades 10 – 12)	18%	121,056	26%	207,843
Enrolment ratio of CSEN (Grades 1 – 7)	1%		5%	
Net Admission Rate (Age 7 at Grade 1)	37.1%		95%	
Transition Rates Rate (Grade 7 to 8)	53%		70%	

<sup>3</sup> Curriculum and Assessment has been broken down into Assessments/Examinations, and Education Materials, While Research and studies covers the University.

Transition Rates Rate (Grade 9 to 10)	44%	50%	
GER Enrolment Rate (Grades 1 – 7)	97%	100%	
GER Enrolment Rate (Grades 8 – 9)	42%	62%	
GER Enrolment Rate (Grades 10 – 12)	18%	28%	
Teacher Training Pre-service		10,136	11,683
Continuing Professional Development		49,420	54,792
University <i>Regular</i>		8,965	12,103
Pupil: Teacher Ratio (Grades 1 – 7)	52:1	45:1	
Pupil: Teacher Ratio (Grades 1 – 4)	-	45:1	
Pupil: Teacher Ratio (Grades 5 – 7)	-	45:1	
Pupil: Teacher Ratio (Grades 8 – 9)	21:1	36:1	
Pupil: Teacher Ratio (Grades 10 – 12)	19:1	28:1	
Pupil:Non-Teaching Staff Ratio		200:1	
Teacher double shifting	43%	43%	
Pupil:Book Ratio	-	2:1	
Pupil: Class Ratio (Grades 1 – 7)	36:1	45:1	
Pupil: Class Ratio (Grades 8 – 9)	40:1	45:1	
Pupil: Class Ratio (Grades 10 – 12)	44:1	42:1	
Classes: Classrooms Ratio (Grades 1 – 4)		2:1	
Classes: Classrooms Ratio (Grades 5 – 7)		1:1	
Classes: Classrooms Ratio (Grades 8 – 9)		1:1	
Classes: Classrooms Ratio (Grades 10 – 12)		1:1	
Teachers needed (Grades 1 – 7)	35,603	38,414	
Teachers needed (Grades 8 – 9)	8,575	9,553	
Teachers needed (Grades 10 – 12)	5,243	6,825	
Non-Teaching Staff Needed		10,814	
Proportion of Pupils reaching the minimum levels Learning Achievement in Numeracy	29%	70%	
Proportion of Pupils reaching the Minimum levels Learning Achievement in Reading In English	29%	70%	

## MINISTRY OF EDUCATION SECTOR PLAN LOGFRAME

NARRATIVE SUMMARY	INDICATORS OF ACHIEVEMENT	MEANS OF VERIFICATION	RISKS/ASSUMPTIONS
<p><b>Goal</b></p> <p>Increased skills for poverty reduction, employment and economic growth</p>	<ol style="list-style-type: none"> <li>1. Improved economic indicators</li> <li>2. Improved social indicators</li> <li>3. Increased formal/informal sector activity</li> </ol>	<ol style="list-style-type: none"> <li>1. PRSP Monitoring</li> <li>2. Household Surveys</li> <li>3. Economic surveys</li> </ol>	<ol style="list-style-type: none"> <li>1. GRZ is able to maintain economic growth of 4%-5% pa</li> <li>2. GRZ is able to implement economic and institutional reforms</li> </ol>
<p><b>Purpose</b></p> <p>Equitable access to relevant quality education and training that incorporates HIV/AIDs interventions</p>	<ol style="list-style-type: none"> <li>1. 100% basic school net enrolment by 2015</li> <li>2. 60% high school net enrolment by 2015</li> <li>3. Learning achievement for grades 1-9 improved to 70% by 2015</li> <li>4. Learning achievement for Grades 10-12 improved to 75% by 2015</li> </ol>	<ol style="list-style-type: none"> <li>1. Household Surveys Annual School Census National Assessment results SACMEQ</li> </ol>	<ol style="list-style-type: none"> <li>1. Current GRZ Budgetary allocations are maintained and increased</li> <li>2. CPs maintain sufficient external funding to address the financing gap</li> </ol>
<p><b>PROGRAMME OUTPUTS</b></p>			
<p><b>1. ACCESS/EQUITY</b></p> <p><b>Basic Education</b></p> <p><b>1.1</b> Free basic education for all children</p>	<p><i>1.1.1</i> Net enrolment of all school age children increased from 68.5% to 80% for Grades 1-7 and from 17.5% to 35% for Grades 8-9 by 2007.</p> <p><i>1.1.2</i> Gross enrolment increased from 101% to 110% for Grades 1-7, and from 46% to 62% for grades 8 to 9 by 2007</p> <p><i>1.1.3</i> Progression rates from Grade 7 to Grades 8 increased from 49% to 70% by 2007</p> <p><i>1.1.4</i> Raise the completion rates from to 89% by 2007</p> <p><b>1.1.5</b> <i>Enrolment of CSEN increased from 1% to 5% of total enrolment by 2007.</i></p>	<ol style="list-style-type: none"> <li>1. Household Surveys</li> <li>2. <b>Annual School Statistics, School Surveys, Census, MoE</b></li> </ol>	<ol style="list-style-type: none"> <li>1. Increased Budgetary allocation by GRZ.</li> <li>2. Long-term donor funding is sustained</li> <li>3. HIPC funds provided and used effectively</li> <li>4. Stakeholder support for education sector</li> <li>5. Population growth is stabilised at 2.7% net p.a.</li> <li>6. Communities remain supportive of education</li> <li>7. Enrolment growth rate of 3.6% p.a</li> </ol>

NARRATIVE SUMMARY	INDICATORS OF ACHIEVEMENT	MEANS OF VERIFICATION	RISKS/ASSUMPTIONS
	<p>1.1.6 Retention and progression of the girl-child from Grades 5-9 increased from 82% to 100% by 2007</p> <p>1.1.7 Completion rates increased from 65% to 86% for Grades 1-7 and from 45% to 59% for Grades 8 to 9 by 2007</p>	<p>3. <b>EB Reports, School Surveys MoE Statistics</b></p>	<p>sustained or improved</p>
<p><b>High School Education</b>  <b>1.2</b> Expanded access and retention in high schools, especially for girls, the poor and CSEN</p>	<p>1.1.8 Mechanisms established by 2004 for more provision of quality basic education to out-of-school children and other vulnerable groups</p> <p><b>1.2.1 Net enrolment of all school age children increased from 9.4% to 25% by 2007</b></p> <p><b>1.2.2 Gross enrolment rate increased from 20% to 28% by 2007</b></p> <p><b>1.2.3 Progression rates from Grade 9 to Grades 10 increased from 26% to 35% by 2007</b></p> <p><b>1.2.4 Policy developed on reserving 35% of boarding places in rural schools for those from surrounding rural districts by end of 2003</b></p> <p><b>1.2.5 Bursary provision for the poor, girls and orphans increased from 8,3% to 20% by 2007</b></p> <p>1.2.6 Open and distance learning system re-organised and improved by 2005</p>	<p>4. <b>Annual Review Report Studies, Inspectors Reports</b></p> <p>5. Annual Review Report,</p> <p>6. School Reports</p> <p>7. Infrastructure Reports, Building Inspection reports</p>	

NARRATIVE SUMMARY	INDICATORS OF ACHIEVEMENT	MEANS OF VERIFICATION	RISKS/ASSUMPTIONS
<p><b>Tertiary Education</b></p> <p><b>1.3</b> Increased access to tertiary education especially for women, poor and those with special education needs</p>	<p>1.3.1 Affirmative policies of admission and funding established by 2003.</p>	<p>8. College Reports, Teacher Education Reports</p>	
<p><b>2. QUALITY</b></p> <p><b>Basic Education</b></p> <p>2.1 Improved learning achievement in basic schools</p> <p><b>High School Education</b></p> <p>2.2 Improved skills, knowledge and learning achievement in high schools</p>	<p><b>1.3.2 Distance education and open learning opportunities for adults expanded by 2006.</b></p> <p>1.3.3 Existing infrastructure, particularly hostel accommodation, at the two universities expanded and rehabilitated by 2005.</p> <p>1.3.4 Existing infrastructure at the Colleges of Education expanded and rehabilitated in line with demand by 2007.</p> <p><b>2.1.1 Learning achievement levels in literacy and numeracy improved from 34% to 50% by 2007</b></p> <p><b>2.1.2 Pupil: textbook ratio of 2:1 achieved for all subjects by 2007</b></p> <p>2.1.3 Mechanism for recruitment and deployment of teachers to rural areas to achieve overall pupil teacher ratio of 64:1 for Grades 1-4 and 45:1 for Grades 5-9 by 2007</p> <p>2.1.4 All basic teachers trained to deliver BECF by end of 2005</p> <p>2.2.1 National performance at school certificate improved from 66% to 72% by 2007</p>	<p>1. National assessment, SACMEQ, Studies, ECZ reports</p> <p>2. Procurement &amp; Supplies Reports School Surveys &amp; DEB Surveys</p> <p>3. Standards Officers' (Inspectors') Reports School Surveys, DEB reports</p> <p>4. Teacher Education Reports, TRC Reports,</p> <p>5. Annual Review Report, Annual School Census</p>	<p>1 Policy on decentralised procurement implemented</p> <p>2. Textbook tracking studies implemented</p> <p>3. ECZ and National Assessment Surveys and Records sustained</p> <p>4. Regular inspection by standards officers maintained</p>



NARRATIVE SUMMARY	INDICATORS OF ACHIEVEMENT	MEANS OF VERIFICATION	RISKS/ASSUMPTIONS
	2.2.2 Pupil: textbook ratio of 5:1 achieved in all subjects by 2006	6. University Dept. Academic Reports	5. Curriculum implemented fully
<p><b>Tertiary Education</b></p> <p>2.3 More efficient and quality college and university education</p>	<p>2.2.3 Pupil: Teacher ratio maintained at 27:1 by 2007</p> <p>2.2.4 More relevant curriculum introduced by 2004</p> <p>2.2.5 All high school teachers trained to deliver the new curriculum by end of 2005</p> <p>2.3.1 Sufficient relevant learning and teaching materials procured by 2007.</p> <p>2.3.2 Production of basic and high school teachers expanded and regulated in line with pupil enrolment growth rates and new curriculum framework by 2004.</p> <p>2.3.3 ZATEC programme reviewed by 2004</p> <p>2.3.4 CPD, particularly the Primary Diploma by distance expanded by 2005</p> <p>2.3.5 Co ordination and validation of distance learning programmes established by 2003</p> <p>2.3.6 Graduate teacher education programmes at Nkrumah Teacher's College developed by 2004</p> <p>2.3.7 Mechanisms of continuous curriculum review at universities put in place by 2004</p> <p>2.3.8 A plan for research activities over the next five years developed by 2003.</p>	<p>7. Curriculum Review</p> <p>8. University Research Reports</p>	<p>6. Improved Budgetary Allocation</p> <p>7. Implementation of incentives for teachers,</p> <p>8. Construction/Rehabilitation of schools, colleges and universities takes place</p>

NARRATIVE SUMMARY	INDICATORS OF ACHIEVEMENT	MEANS OF VERIFICATION	RISKS/ASSUMPTIONS
<p><b>3. ADMINISTRATION, FINANCING &amp; MANAGEMENT</b>  <b>Basic, High School and Tertiary Education</b></p> <p>3.1 Effective and adequately financed decentralised education delivery system</p> <p><b>4. HIV/AIDS</b>  <b>Basic, High School and Tertiary</b></p> <p>4.1 Reduction of HIV/AIDS infection</p>	<p>.</p> <p>3.1.1 All education boards trained in education management, development planning and financial management by 2004</p> <p>3.1.2 Measures for sound university administration, financial management and planning put in place by 2004</p> <p>3.1.3. Mechanism for replacement of teachers, lecturers, and officials who are absent through sickness or death established by 2004</p> <p>3.1.4 Education expenditure projected as follows:  <b>Admin.</b> : From 10% in 2002 to 11% in 2007  <b>Basic</b> : From 64% in 2002 to 65% in 2007  <b>High School:</b> From 10% in 2002 to 10% in 2007  <b>Colleges</b> : From 4% in 2002 to 3% in 2007  <b>CPD</b> : From 2% in 2002 to 3% in 2007  <b>Universities</b> : From 9% in 2002 to 8% in 2007  <b>Other</b> : From 1% in 2007 to 1% in 2007</p> <p>4.1.1 Information on prevention of HIV/AIDS infection available to all pupils, teachers, college/university students, lecturers and education officials by end of 2003</p>	<p>1. Education Board Reports, HR Reports</p> <p>2. Financial Reports</p> <p>3. School Surveys , Standards Officers Reports, HR Reports</p> <p>4. Annual Review Report, Financial Reports</p> <p>1. School,college and university Surveys, Household Surveys</p>	<p>1. Policy on teacher replacement is implemented</p> <p>2. Decentralisation policy is fully carried out and sustained</p> <p>3. Sufficient funds allocated by GRZ for regular quarterly disbursements</p> <p>4. Education boards develop and maintain the capacity to handle finance and management</p> <p>1. GRZ and MoE commitment to HIV/AIDS issues is sustained</p> <p>2. Behaviour change is able to take place</p>

NARRATIVE SUMMARY	INDICATORS OF ACHIEVEMENT	MEANS OF VERIFICATION	RISKS/ASSUMPTIONS
	<p>4.1.2 Support and protection measures implemented in every school, college, university and education office by 2004</p> <p>4.1.3 Support systems and workforce policies for those infected and affected in the education system established by 2003</p> <p>4.1.4 School health and nutrition policies and plans implemented in all schools by 2007</p>	<p>2. HIV/AIDs Unit Reports, NAC Reports, Studies</p> <p>3. Annual School Census, EB Reports, Standards Officers Reports</p> <p>4. SHN Reports, WFP Reports</p>	<p>3. <i>Supplies of materials, drugs, condoms continue to be available</i></p> <p>4. Sufficient funds allocated for implementation of funds.</p>

