

African Experiences
Country Case Studies

9



Education in Africa

**Impact of the
Primary Education
Reform Program (PERP)
on the Quality of Basic
Education in Uganda**



Association for the Development of Education in Africa

*Impact of the Primary Education Reform Program (PERP)
on the Quality of Basic Education in Uganda*

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African Experiences
Country Case Studies

**Impact of Primary
Education Reform Program (PERP)
on the Quality
of Basic Education in Uganda**

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Foreword

Since attainment of political independence in 1962, Uganda has always recognized education as an instrument for social development and transformation. Basic education in particular is seen to play a critical role in shaping the pace of the country's moral, intellectual ideological, cultural, social and economic development. In addition, it guarantees the achievement of national goals of unity, democracy, economic progress, security and social justice for all citizens. What is more, education plays a significant role in liberating the majority of our people from the vicious circle of poverty, economic dependence, ignorance, disease and indignity.

Throughout the 1960s, although Uganda's education system was elitist and small, it was reputed across Africa to be of good quality. Unfortunately, from the early 1970s to mid 1980s, the country underwent political instability that resulted into civil strife and economic ruin. Consequently and like all other sectors of the economy, Uganda's education system was adversely affected. Budgetary allocations to the sector plummeted to less than 1% of the gross domestic product (GDP); only 50% of children of school-going age attended school and over 90% of the education costs were borne directly by parents.

Furthermore, most of the school infrastructure had either become dilapidated or been destroyed during the war; textbooks, teachers' guides and other critical instructional materials were lacking in a majority of schools. In addition teachers were underpaid and more than half of the teaching force were under-trained or untrained and thus highly demoralized. Above all, the core functions of planning and management had been weakened beyond repair, while the curricula and the related assessment systems had been rendered obsolete. It is against this background that the Primary Education Reform Program (PERP) was launched in 1992.

PERP was a comprehensive education reform program that was intended to stem the tide of decay that had engulfed the education system, and start it on the course of development. The program was designed around three pillars of improving access and equity to basic education; enhancing quality through training of teachers; and strengthening institutional capacities for education planning and management.

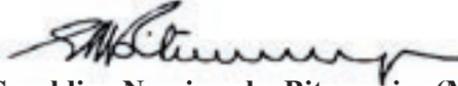
The successful implementation of PERP has not only become the watershed for the education reform in the country, but also a groundbreaking intervention for a host of other innovations in the sector. Innovations such as the Teacher Development and Management System (TDMS) that combines the benefits of long distance training and face-to-face training, including the Sector-Wide Approach (SWAP), in the education sector would probably not have been possible without the firm foundation laid down by the PERP.

This study presents the PERP as a comprehensive education reform program designed in a post-conflict era and implemented against a backdrop of wide-ranging socio-political, macro-economic and sectoral reforms in the country. It highlights the context, the strategies adopted, the process of implementation and the main achievements as well as the outcomes of the program. Perhaps more importantly, the study presents lessons learnt that enabled PERP under the circumstances to be as successful an intervention as it was. These lessons include national ownership; political goodwill; community participation; and, last but not least, transparency and accountability. The study also outlines the key challenges that faced PERP implementation: rampant poverty, rapid population growth, social exclusion, wars and conflict as well as the high incidence of HIV/AIDS.

This publication will no doubt provide valuable insights on the nature and dynamics of educational reforms in the education sector in Africa in general and in post-conflict situations in particular. I therefore recommend it to all educational practitioners throughout the continent and beyond, particularly planners, policy-makers and

professionals that are involved in the crafting or implementation of educational reforms of any magnitude.

Finally, I would like to acknowledge the technical and financial assistance provided by the Association for the Development of Education in Africa (ADEA) Secretariat that made this study possible.



Hon. Geraldine Namirembe Bitamazire (MP)
Minister of Education and Sports, Uganda
November 2005.

List of Acronyms

ABEK	Alternative Basic Education for Karamoja
ACP	Aids Control Program
ADEA	Association for the Development of Education in Africa
AIDS	Acquired Immune Deficiency Syndrome
BEUPA	Basic Education for Urban Poverty Areas
CA	Continuous Assessment
CC	Coordinating Center
CCG	Classroom Completion Grant
CCT	Coordinating Center Tutor
COPE	Complementary Opportunities to Primary Education
CPD	Continuous Professional Development
DEO	District Education Officer
DFID	Department for International Development
DIS	District Inspector of Schools
DTE	Diploma in Teacher Education
EASL	East African School for Librarianship
EFAG	Education Funding Agencies
EMIS	Education Management Information System
EPD	Education Planning Department
EPRC	Education Policy Review Commission
ESA	Education Standard Agency
ESC	Education Service Commission
ESCC	Education Sector Consultative Committee
ESIP	Education Strategic Investment Plan
ESR	Education Sector Reviews
EU	European Union
GDP	Gross Domestic Product
GEM	Girls' Education Movement

GER	Gross Enrolment Ratio
GoU	Government of Uganda
GWPE	Government White Paper on Education
HIPC	Highly Indebted Poor Countries
HIV	Human Immune Virus
HOTS	Higher Order thinking Skills
IDA	International Development Agency
IMF	International Monetary Fund
IMS	Instructional Materials Supply
IMU	Instructional Materials Unit
IPS	Integrated production skills
ITEK	Institute of Teacher Education Kyambogo
LPO	Local Purchase Order
MLA	Monitoring Learning Achievement
MOES	Ministry of Education and Sports
MoFPED	Ministry of Finance and Economic Development
MoLG	Ministry of Local Government
MTBF	Medium Term Budgetary Frame Work
MTEF	Medium Term Expenditure Framework
NAPE	National Assessment for Progress in Education
NAEP	National Assessment of Educational Performance
NCBS	National college of business
NCDC	National Curriculum Development Center
NER	Net Enrolment Ratio
NPA	Non Project Assistance
NPERPMC	National Primary Education Reform Program Management Committee
NRM	National Resistance Movement
NTC	National Teachers College
OS	Outreach School
PAF	Poverty Action Fund
PAPSCA	Program to Alleviate and Poverty Social Costs of Adjustment.

PBR	Pupil Book Ratio
PEAP	Poverty Eradication Action Plan
PERP	Primary Education Reform Program
PETDP	Primary Education Teacher Development Program
PGMS	Peer Group Meetings
PIU	Project Implementation Unit
PLE	Primary Leaving Examination
PMA	Plan for Modernization of Agriculture.
PSRC	Public Service Review and Reorganization Committee
PTA	Parent Teacher Association
PTC	Primary Teacher College
PTE	Primary Teacher Education
PTR	Pupil Teacher Ratio
ROM	Result Oriented Management
SACMEQ	South African Consortium for Monitoring Education Quality
SAPS	Structural Adjustment Programs
SFG	School Facilities Grant
SMC	School Management Committees
STDs	Sexually Transmitted Diseases
SUPER	Support Uganda Primary Education Reform
SWAP	Sector-Wide Approach
TASO	The AIDS Support Organization
TDMS	Teacher Development and Management System
TOF	Training of Facilitators
TOT	Trainer of Trainers
UACE	Uganda Advanced Certificate of Education
UBOS	Uganda Bureau of Statistics
UCC	Uganda College of Commerce
UCE	Uganda Certificate of Education
UJTC	Uganda Junior Technicians Certificate
ULB	Uganda Literature Bureau

UMI	Uganda Management Institute
UNC	Uganda National Congress
UNEB	Uganda National Examination Board
UNESCO	United Nations Educational, Scientific, Cultural Organization
UNICEF	United Nations International Education Fund
UPE	Universal Primary Education
UPK	Uganda polytechnic Kyambogo
UPPAP	Uganda Participatory Poverty Assessment Project.
UPS	Un-interruptible Power Supply
USAID	United States Agency for International Development
VCM	Voluntary Community Mobilizers

Summary

Since 1992 the Government of Uganda has been involved in a wide-ranging and ambitious program to reform basic education with the aim of reversing the decline that characterized the sector in the previous two decades, and thereby revitalized education for socio-economic recovery. The main objective of this case study was therefore to assess the impact of the Primary Education Reform Program (PERP) on the provision of quality basic education in Uganda. The reform process itself had three pivotal concerns:

- To expand access to quality learning opportunities through a two-pronged intervention involving the revamping of the primary school teacher training programs on one hand, and the introduction of Universal Primary Education (UPE) on the other. The Teacher Development Management System (TDMS) provided pre-service training for untrained and under-trained teachers and in-service professional upgrading for teachers, school heads and education managers. It involved reforms of primary teachers training colleges and their outreach activities, curriculum review, provision of instruction materials and building of education infrastructure. The UPE implementation was a major reform to increase access and equity in provision of primary education in the country. The implementation entailed provision of infrastructure, qualified teachers and capitation grants, as well as reform of the primary school curriculum. This led to enormous expansion of basic education: for instance, enrolment rates increased from about 3 million in 1996 to over 7 million in 2002. UPE also provided for alternative basic education opportunities to children of nomadic communities and urban poor, drop-outs and those needing special education. There was also affirmative action in support of education for girls.
- To improve school level management capacity by exposing mainly the local level education managers to well conceived courses in basic management skills. The second thrust of this reform was provision of learning materials to schools through

revitalization of private sector publishing and distribution of learning materials and ensuring effective and efficient mechanism for coordination of various inputs.

- To strengthen planning, policy analysis, to upgrade management skills and information systems, to build capacities for implementation, monitoring and evaluation, and to reform curriculum and examinations. Building capacities for implementation entailed coming up with a framework for donor co-ordination and implementation for Sector-Wide Approach (SWAP) to planning.

The case study depended and utilized extensively policy documents, implementation reports, internal and external assessment of various aspects of the reform process. Research for the case study used critical analytical procedures to come to an understanding of socio-economic factors which conditioned the inception and subsequent implementation of PERP. The major thrust of the study was to analyze how the reforms impinged and contributed to quality improvements and outcomes.

The results indicate various manifestations of quality improvements in primary education including:

- The restoration of the previously degenerate professional and socio-economic status of primary school teachers largely through support of continuous professional growth, upgrading of skills and knowledge, and better remunerations.
- Overall upgrading of untrained teachers through introduction of flexible, needs-tailored and responsive training mechanisms. This reduced the proportion of untrained teachers in the system
- A more even spatial distribution of qualified primary school teachers throughout the country which was achieved by ensuring compliance with the established school staff ceiling formula.
- The creation of specially trained and inducted cadre of teacher educators who are conversant with both pre-service and in-service teacher training delivery models.
- Upgrading of the managerial skills among primary school heads, members of school committees, some district level staff, utili-

zing a multi-faceted strategy that involved participation in study tours, provision of technical assistance and on-the-job training.

- A notable community responsiveness and change of attitudes and values towards educational endeavors and initiatives.
- Greater pupil participation in schooling as evidenced by higher enrolment ratios, substantial reductions in gender disparities and increased cohort survival rates.
- Improvement in the quality of primary teachers' colleges' facilities, equipment and accessories, providing a strong motivational effect on the teaching–learning process.
- A marked increment in the supply of cheaper but more locally adapted instructional materials.
- The development of more inclusive and demand-driven curricula for use in primary schools and primary teachers' colleges.
- The revision of the national examination system to make it more of a teaching–learning tool rather than a mere screening device. This was done partly through a redirection of its focus to the testing higher order cognitive competencies as opposed to the assessment of a learner's memory skills.
- Strengthening of the capacity of the Ministry of Education and Sports (MOES) personnel and orientation towards undertaking planning, policy analysis, management and implementation of reforms, information processing, monitoring and evaluation.

It is from the above context that the case study has identified positive achievements and some critical lessons from the implementations of the reforms.

The findings affirm the need for clear conceptualization of objectives and priorities of the intended educational reforms. It also emphasizes the need to create and strengthen appropriate institutional structures, and develop managerial capacities for process implementation. Uganda was fortunate in this respect in that it had political will and commitment to realize the reforms. This was complemented by community-based support that has been essential in the implementation, as well as sustainability, of the reform thrust.

New partnerships were created and roles redefined in the context of reform needs in and particular partnership was forged between the central government, local authorities, communities, non-governmental organizations (NGOs) and the donor communities. These partnerships have been crucial to the implementation, management and coordination of changes in the entire education system. The establishment of mechanisms for accountability, transparency, decentralization and participation have been the hallmarks of the attempt to improve quality of teaching and learning in Ugandan schools.

Education reforms tend to be expensive and Ugandan experience is no exception. The government commitment was translated into financial allocation for the Ministry of Education and Sports. This commitment has so far sustained the on-going changes and has been complemented by coordinated donor funding. While the case study has shown that political will has been critical in carrying out country-wide education reforms, there are no clear indicators that these reforms will eventually lead to quality outcomes. This points to the need for a reflection on how the reforms can be sustained in the long term and translated into concrete quality outcomes.

Although PERP has had a transformative effect on the delivery of the basic education services in the country, there are still a host of constraining factors, which undermine full realization of the intended outcomes. These include, inter alia, the continued prevalence of poverty, diseases (especially malaria and HIV/AIDS) and persistent internal and external conflicts with their disruptive impact on the social welfare of the population.

Uganda in general has the requisite potential and opportunities for dealing with the challenges and the limitations that face the implementation of reforms that are geared to improvement of quality of education. These have to be seen in the wider political and economic context of poverty reduction, empowerment of marginalized groups, catering for girls' education and peaceful resolution of conflicts. Finally, the sustainability of the reforms and the improvement of

quality of education depend not only on the political will and donor support, but much more on the rate of economic growth that the country will be able to achieve.

1. Introduction

In preparation for the December 2003 biennial meeting, the Association for the Development of Education in Africa (ADEA) invited a number of member states to contribute case studies of the Implementation of Education Programs related to the theme of “The Challenge of Learning: Improving the Quality of Basic Education in Sub-Saharan Africa.” The purpose was to enable African countries to share their recent experiences in addressing the provision of quality basic education for all.

It is in response to this invitation that Uganda undertook the assessment of the impact of Primary Education Reform Program (PERP) on the quality of basic education.

Methodology

This was archival research involving a critical analysis of the records and documents relevant to the implementation of PERP. The main thrust of the documentary analysis was directed towards understanding the contextual factors that conditioned PERP: its implementation arrangements, activities and innovations; the quality of outcomes of the reform process and the lessons learnt, challenges, constraints and opportunities. The data collected were then subjected to content analysis to derive a comprehensive write-up, which also included some reflective observations.

Background

Planning for the reform

Uganda’s Primary Education Reform Program has its origin in the political program of the National Resistance Movement (NRM) government. After taking the mantle of leadership in 1986, the NRM government instituted a series of commissions to appraise key sectors that were critical to its socio-economic recovery program.

The Education Policy Review Commission (EPRC) was one such commission.

Planning for the PERP began in 1987 with the appointment of the EPRC, which was mandated by government to review the entire education system in the country and advise on what needed to be done to revamp it. After extensive consultations with all the key stakeholders, the commission submitted its report to government; it contained wide-ranging recommendations on how to revigorate the education system.

The government accepted most of the commission's recommendations and in 1991 appointed a White Paper committee to consolidate these recommendations into a draft education policy. The draft White Paper was submitted to Parliament for debate, and in April 1992, Parliament passed it as a new government policy of education. The importance attached to the primary education sub-sector was evident in the newly legalized education policy. Indeed, in its submission of the background to the budget (1991/92), government made a policy pronouncement on primary education to the effect that:

“The focus for the new decade and beyond will be primary education in terms of both universal and high quality....This entails shifting resources from secondary and tertiary institutions particularly where they are being used for non-instructional subsidies towards primary level...”¹

Soon afterwards, the government embarked on the formulation of the PERP based on the following three pillars:

- Increasing access to quality learning opportunities;
- Improving school management and instructional quality;
- Strengthening planning, management and implementation.

This therefore was designed to be a multi-faceted reform program covering all the key aspects of basic education provision.

1. Background to the Budget, 1991/92 - (Pg. 2)

PERP was launched in 1993, and to kick-start it, a Primary Education and Teacher Development Project (PETDP) was put in place. This project had two main components that were critical to the recovery of primary education sub-sector in the country. These were:

- Improving primary school teaching and management;
- Strengthening strategic functions of the Ministry of Education and Sports.

PETDP was jointly funded by the World Bank, the United States Agency for International Development (USAID) and government of Uganda (GoU). The Project Implementation Unit (PIU) of the Ministry of Education and Sports was responsible for overseeing the implementation of PETDP at the national, district, core Primary Teacher College (PTC) and school levels. More specifically, PIU's mandate was focused on planning, policy formulation, financial management and monitoring and evaluation.

Basic education provision in Uganda

Educationists usually define basic education as “either a minimum number of years of education in which a beneficiary is expected to achieve a level of numeracy and literacy that can be maintained through out-of-school services after completion or the maximum number of years that the government can afford to provide for all or most of its citizens.”²

The significance attached to basic education is clear. Not only is it expected to produce literate and numerate citizens that can effectively deal with everyday life challenges both at home and at work, but it also serves as the foundation upon which the entire education system is built. It is therefore imperative that countries establish a primary education system that caters to both universal access to all school-age children and effective learning.

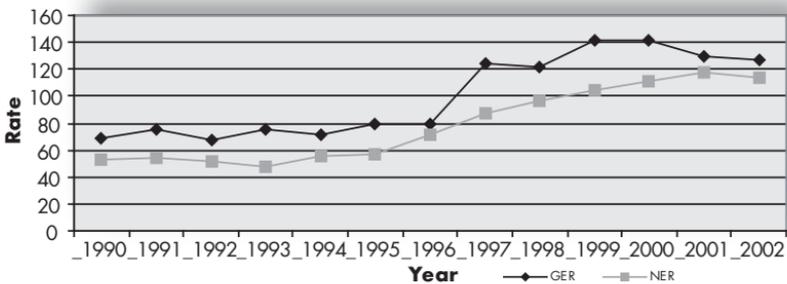
In Uganda, although there are several alternative forms of basic education, primary education is the main segment by an overwhelming

2. Jacques Hallak, *Investing in the Future*, UNESCO: IIEP, 1990 – (Pg. 114)

majority. In this paper therefore, primary education and basic education are used synonymously.

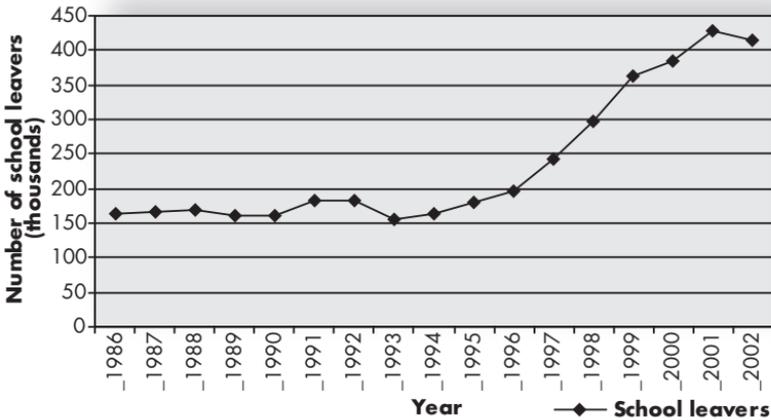
Primary education in Uganda covers a seven-year cycle from P1 to P7. Standard age cohorts range from age 6 to 13 years. However, it is significant to note that actual gross enrolment ratios are much higher than 100%, indicating a variable starting age of schooling. Thus, formal schooling in P1 to P7 includes many children older than 13 years as well as some as young as three years. This is evident in the figure below.

Figure 1.1. Trend in gross and net enrolment rates (1990–2002)



Although in the immediate post-independence period Uganda had built a fairly high quality basic education sub-sector, the subsequent decades of political upheaval, economic mismanagement and the devastating effects of HIV/AIDS combined to effectively disable the education system’s ability to cope with increased primary school enrolments. These, together with a weak institutional capacity for planning, management and implementation, increased the predicament of the education sector. As a result, by 1990, all the key indicators of quality such as cohort survival rates, pupil teacher ratios, and teacher attrition had worsened. This resulted in public disenchantment with the quality of basic education, as evidenced by its inability to fulfill national aspirations.

Figure 1.2. Trend in school completers (1986–2002)



Reform of basic education in Uganda

Education reforms are often undertaken as systematic efforts designed to bring about large-scale changes in the education system. The purpose invariably is to both expand the system and improve it in order to get it better adapted to the needs of the population.

In general, the Primary Education Reform Program has generated many structural improvements in basic education service delivery, especially in areas of planning, management and implementation. It has also enabled the creation of diversified institutional frameworks at the center, district and school levels to support the delivery of basic education services. The initiatives undertaken under the reform have empowered decision-makers at these levels to effectively manage and support basic education development in the country. Above all, the reform itself has created a permanent platform for introducing basic education innovations that are both cost-effective and sustainable.

Mobilizing for the reform

Upon receipt of the EPRC report, government subjected it to a nation-wide consultative process to gauge its acceptability and

support among the stakeholders. This process took two years (1989-1990). On the basis of the outcome of this process, government accepted most of the recommendations of the commission, marking the beginning of the PERP formulation process.

However, there was need to first resolve pertinent issues relating to policy, resources, implementation and the participation of key stakeholders in the reform program.

Two decades of civil unrest, economic decline and escalating public debt substantially reduced funding to the education sector. In addition, there was lack of critical skills in planning, management and implementation, caused by brain drain. The greatest challenge to government was the mobilization of the vast amounts of resources needed to implement PERP. Governmental initiatives in creating new partnerships with key stakeholders (local communities, private sector, multilateral and bilateral agencies) were crucial in mitigating the problem of resource constraints.

Concerning implementation capacity, the government had earlier on set up a Project Implementation Unit, staffed by professional personnel on a contractual basis. The recurrent costs of the PIU were met within the line items of each of the project budgets. PIU was thus established as a short-term measure intended to allow time for the revitalization of these critical functions with the mainstream departments of the Ministry of Education and Sports.

Subsequently, when PERP was being formulated, government continued to maximize stakeholders' participation through massive multimedia sensitization and awareness-raising campaigns. The role of partnership in education sector activities has since been strengthened further and is an integral part of the present education policy.

2. National context

The geographical setting

Uganda is located in East Africa and lies 1200m above sea level astride the equator between latitudes 4°12' to the north and 1°29' to the south and between longitudes 29°34' to the west and 35°00' to the east. It is a landlocked country with a total surface area of 241,039 square kilometers, bordering Kenya in the east, Tanzania in the south, Rwanda in the southwest, Democratic Republic of Congo in the west and Sudan in the north.

Owing to its altitude and location, Uganda enjoys a favorable climate. The central, eastern and western regions have two rainy seasons per year, with heavy rains from March to May, and light rains between September and December. Rainfall intensity decreases to the north and tapers into one rainy season. The country is well endowed with fertile soils and the resultant vegetation cover ranges from the tropical rain forest in the south to the savannah woodlands and semi-desert type in the north.

Since these geographical features condition the economic potential and the population carrying capacities of the various regions within Uganda, they have important implications on the education service delivery, especially with regard to access, equity, efficiency and quality. For example, the more fertile and geographically attractive regions of the south offer better prospects for providing more sustainable quality Universal Primary Education than the relatively less fertile northern areas. Instead, the rugged terrain of the more remotely located districts of Kisoro, Kibaale, Moyo, Moroto, Kotido, and others could impair access to and the efficiency of primary education.

The demographic trends

Table 2.1 demonstrates how demographic and human development indices have changed between the population censuses of 1948 and 2002.

Table 2.1. Uganda's population characteristics (1948–2002)

Indicator	Census Year					
	1948	1959	1969	1980	1991	2002
Population (million)	5.0	6.5	9.5	12.6	16.7	24.7
Population Increase (million)	na	1.5	3.0	3.1	4.1	8.0
Intercensal growth rate (%)	na	2.54	3.85	2.71	2.52	3.4
Sex ratio	100.2	100.9	101.9	98.2	96.5	96.0
Crude birth rate	42.0	44.0	50.0	50.0	52.0	47.3
Total fertility rate	5.9	5.9	7.1	7.2	7.1	6.9
Crude death rate	25.0	20.0	19.0	na	17.0	15.0
Infant mortality rate	200.0	160.0	120.0	na	122.0	160.0
Percent urban	na	4.8	7.8	8.7	11.3	12.3
Density (pop/km ²)	25.2	33.2	48.4	64.4	85.0	126.0

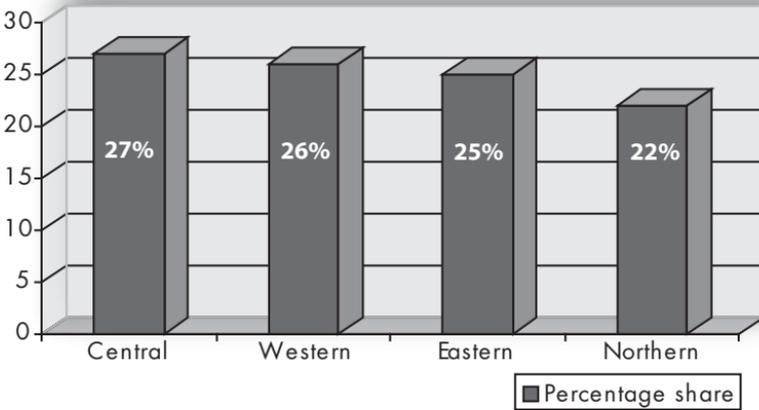
Source: Provisional results of the 2002 population and housing census Uganda Bureau of Statistics, Entebbe.

The *Table 2.1* shows that Uganda's population increased nearly fivefold from 5 million in 1948 to 24.7 million in 2002. Between January 1991 and September 2002 alone, there was an increase of 8 million persons, representing the highest intercensal increment ever recorded. The current high population growth rate of 3.4% per annum is largely attributed to a high fertility rate of about seven children per woman, a relatively high birth rate combined with declining infant mortality and crude death rates.

The sex ratio (the number of males per 100 females) has been steadily decreasing from 101.9 in 1969 to 96.0 in 2002, and population density has risen from 25 persons per square kilometer in 1948 to 126 in 2002. Approximately 88% of the population live in rural areas.

The spatial distribution of Uganda’s population is uneven: the distribution by region is shown in *Figure 2.1* below.

Figure 2.1. Population by region in 2002 (%)



The distribution shows that the central region has the largest share of the population (27%) while the western, eastern and northern regions have 26%, 25% and 22% respectively.

There are important linkages between these population characteristics and the quality of educational provision. A high population growth rate invariably implies a high percentage of primary-school-age population, currently estimated to be 19% of the total population. It is also a partial explanation for the country’s high dependency ratio of 124:7.³ Both factors combine to magnify the challenge of achieving quality UPE. In addition, the declining sex ratios complicate the objective of eliminating gender disparities in education and differences in the spatial distribution of the population help to perpetuate regional imbalances in quality schooling, especially between rural and urban areas.

3. The dependency ratio gives an indication of the country’s own resources generated by tax revenue vs. external financial resources.

Overall, a rapidly expanding population compromises a country's capacity for quality social service delivery with serious negative effects on learning.

The political setting

Uganda's pre- and post-independence political history can be summarized in the schema below:

Table 2.2. Uganda's pre- and post-independence political history

Period	Existing Political System	Political Outcomes	Impact on Education
1896-1961	<ul style="list-style-type: none"> - A centralized protectorate government was set up in 1896. - Employed an "indirect rule" system of administration. - Oriented to serving colonial interests. 	<ul style="list-style-type: none"> - The local population played a passive role in the politics of the country. - Only the local kings and chiefs had a say in the administration process. - Delayed development of nationalism. 	<ul style="list-style-type: none"> - Education remained elitist benefiting mainly foreigners and the children of the local kings and chiefs. - Education was not tailored to the needs of the local communities. - The curriculum remained narrow emphasizing the 3R's (Reading, Writing and Arithmetic).
1962-1971	<ul style="list-style-type: none"> - Uganda gained political independence in 1962, practiced multi-party politics and operated under a unitary system of government. - There was constitutional rule up to 1966. - Ambitious post-independence development programs undertaken. 	<ul style="list-style-type: none"> - Relative political stability prior to 1966. - Limited participation of the local communities in the politics of the country. - Initiation of many development programs in all sectors of the economy. 	<ul style="list-style-type: none"> - New schools were constructed. - Primary school enrolment rose from 500 000 pupils in 1962 to about 800 000 pupils in 1971. - Schools were adequately supplied with relevant materials and equipment. - The teachers were well motivated. - However, only 50% of the primary school age population was enrolled at school and about 28% could complete the primary school cycle.
1971-1979	<ul style="list-style-type: none"> - A military dictatorship with parochial interests was in charge. - The constitution was suspended and the military government ruled by decree. 	<ul style="list-style-type: none"> - There was no rule of law. - Civil unrest and insecurity - Local initiatives were suppressed. - No capacity and political will to implement national development programs. - Collapse of the political infrastructure and the social and economic sectors. 	<ul style="list-style-type: none"> - Deterioration of the school infrastructure. - Inadequate supply of essential instructional materials. - Increasing numbers of untrained, underpaid and demoralized teachers. - Increased drop out rates due to under valuation of education. - Poor management and planning of education at all levels.

1980-1985	<ul style="list-style-type: none"> - There was a newly elected multi-party government. - A cross-section of political stakeholders vied for control of the state machinery. 	<ul style="list-style-type: none"> - There was a political vacuum. - There were civil wars, loss of life and property. - Local communities exploited the political vacuum to initiate self-help development projects. 	<ul style="list-style-type: none"> - Burden of financing education shifted to parents. - Unplanned expansion of education - Limited access to education for children from poorer backgrounds. - School infrastructure got destroyed.
1986-present	<ul style="list-style-type: none"> - A broad-based National Resistance Movement government was adopted in 1986. - A new national constitution was promulgated in 1995. - Emphasis was on the democratic ideals of freedom of speech, expression and association. 	<ul style="list-style-type: none"> - Restored order and security. - Embarked on new reform programs including decentralization. - A return to democracy and the rule of law. - Increased participation of the local population in decision-making processes. 	<ul style="list-style-type: none"> - Education Policy Review Commission appointed in 1989 to review the education system. - Government White Paper on education passed by Parliament in 1992. - Primary Education Reform Program launched in 1993. - Implementation of UPE program in 1997. - Increase in GER for primary schools from 80% in 1996 to 142% in 2001. - Revamp of managerial and instructional capacities through several interventions including TDMS, ESIP, EMIS, SFG, PAF, etc. - Increase in budgetary allocations to the education sector. - Greater community participation in educational issues. - Improved supply of instructional materials and increased classroom construction.

The socio-economic policy framework

The mismanagement and civil strife which typified the 1971-1985 period adversely affected the Ugandan economy and social sector; the public sector became overextended; the quality and efficiency of the civil service was severely compromised; fiscal and monetary mismanagement exacerbated inflation; price controls together with an overvalued exchange rate undermined the money economy and encouraged the emergence of black markets. There was near total breakdown in the physical infrastructure and social services. By 1986, the key economic indicators had fallen to the following approximate percentages of their 1970 values; exports to 40%; imports to 50%; real GDP to 75%; real GDP per capita to 50%.

Soon after taking over the reins of power in 1986, the NRM government, in concert with its development partners, started executing structural adjustment policy packages, which involved trade liberalization, privatization and divestiture of public enterprise, foreign exchange liberalization, reorganization of tax revenue collection, civil service reform, reduction in the size of the army, decentralization, streamlining of the investment policy and rehabilitation of the socio-economic infrastructure.

The positive response of the economic and social sector to these stabilization and recovery measures was commendable. For example, there was noticeable improvement from an annual GDP growth rate of 0.3% in 1986 to 6.4% in 1987, 7.2% in 1988, 6.6% in 1990 and 5.6% in 2000. An inflation rate in excess of 200% in 1986 went down to 4.5% in 2001/2002. The current GDP estimates stand at US \$8.867 billion, up from US \$2.088 billion in 1991. The overall maintenance of the macro-economic stability is satisfactory. Consequently, budgetary allocations to the social sector, including the basic education sub-sector, increased.

However, concerns about inequitable growth and general household poverty and poor social sector services have obliged government to re-orient its development programs towards poverty eradication and improvement in social service delivery. To this end, government developed a national policy framework for fighting poverty, known as the Poverty Eradication Action Plan (PEAP). PEAP concentrated its first set of priority interventions in four areas: basic education, basic health services, rural sanitation and rural roads. Within the framework of PEAP, government has adopted Sector-Wide Approaches to address sector-specific constraints. In education, it is called the Education Sector Investment Plan (ESIP). ESIP helps to position interventions concerning education within an overall perspective that focuses on poverty as a leading impediment to quality education in Uganda. In the health sector, reform efforts have been focused on the provision of cost-effective treatment, nutritional policy, adolescent sexual and reproductive health policy, family planning, immunization programs for children, safe motherhood and the framework

for HIV/AIDS interventions, all of which affect the quality of new entrants to primary school and the extent to which they can benefit from a schooling process.

With regards to governance, the NRM government has to a large extent succeeded in restoring respect for the rule of law, respect for democratic values and practices, and freedom of the press. It has also strengthened the position of women and other marginalized groups, and it continues to make serious efforts to fight corruption. All these actions have a catalytic effect on access to, equity and quality of basic education.

In recognition of these efforts, Uganda became one of the main beneficiaries of donor funding and was the first to qualify for debt relief under the Highly Indebted Poor Countries (HIPC) initiative in April 1998. The relief savings and the additional donor funds are now being channeled into sustaining Universal Primary Education, through the Poverty Action Fund (PAF), which has been mainstreamed into the national Poverty Eradication Action Plan.

The education system and policy framework

The present four-tier structure of Uganda's formal education system has been in existence since the early 1960s (*Figure 2.2* page 37). It is comprised of seven years of primary schooling followed by the lower secondary cycle of four years (leading to the Uganda Certificate of Education, or UCE, award) and the upper secondary cycle of two years (leading to the Uganda Advanced Certificate of Education, or UACE, award). This 7-4-2 system of schooling is followed by a three to five years of university education. A primary school completer can either proceed to secondary education or opt for a three-year crafts course in a technical school. The UCE completers have four alternative avenues for further education and training:

- Accessing advanced level (UACE) education;
- Enrolling for a two-year advanced course in technical institutes;
- Joining the two-year Grade three primary teacher training program in primary teachers' colleges;

- Joining any of the government departmental training institutes, which offer a variety of technical and professional courses under different ministries, such as, ministries of labor, agriculture, animal industry and fisheries, environment and cooperatives. Their courses lead to certificates or diplomas after one to three years of training.

Graduates from these four alternative outlets can then choose pursue university education.

Similarly, the UACE completers have several promotional avenues:

- Proceeding to university;
- Joining a two-year course in a national teachers' college;
- Enrolling for a two-year course in the Uganda Technical College;
- Proceeding to Uganda College of Commerce;
- Joining any of the programs of departmental training.

As well as this formal education structure, there is also pre-primary and non-formal education.

Like most other sectors, Uganda's education system suffered substantially between 1971 and 1985. Budgetary allocations to the education sector declined from 3.4% to 1.4%; only 50% of the total primary-school-age children attended school, and most of the burden of financing education was borne by parents; the physical infrastructure had either deteriorated or been destroyed; textbooks, teachers' guides and other essential instructional materials were virtually non-existent in most schools; teachers were underpaid, undertrained or untrained and demoralized; above all, the management and planning of education service was wanting at all levels, and the curriculum and the related assessment system were obsolete.

However, with the restoration of peace in 1986, the government initiated the process of reforming and reconstructing the education system by setting up the Education Policy Review Commission (EPRC) to chart the way forward. The major education thrusts that are now operational are a derivative of the EPRC, which were, in

turn refined in the government White Paper on Education of 1994. Based on the key provisions of the White Paper, the Uganda Government launched the Education Strategic Investment Plan (1998-2003) with special emphasis on:

- Access to Universal Primary Education and democratization of education by ensuring greater access to all types of education, adoption of a language policy that makes learning easier, diversification of the curriculum, strengthening of guidance and counseling services, and creation of appropriate educational opportunities for the handicapped and other disadvantaged groups;
- Strengthening of the relationships between general academic education and the world of work through vocationalization of education, non-formal educational programs for primary school leavers and through a scheme of community service;
- Improvement of quality of education at all levels through enhancement of facilities in schools, better availability of institutional materials, improved curriculum and evaluation procedures, strengthening of teacher training, and by ensuring that teachers are adequately remunerated. Quality was also improved through rehabilitation of educational institutions, reorganization of the administrative structure through decentralization and devolution of power to the district and other local authorities.

For the primary education sub-sector, the major thrusts of the Primary Education Reform Program included:

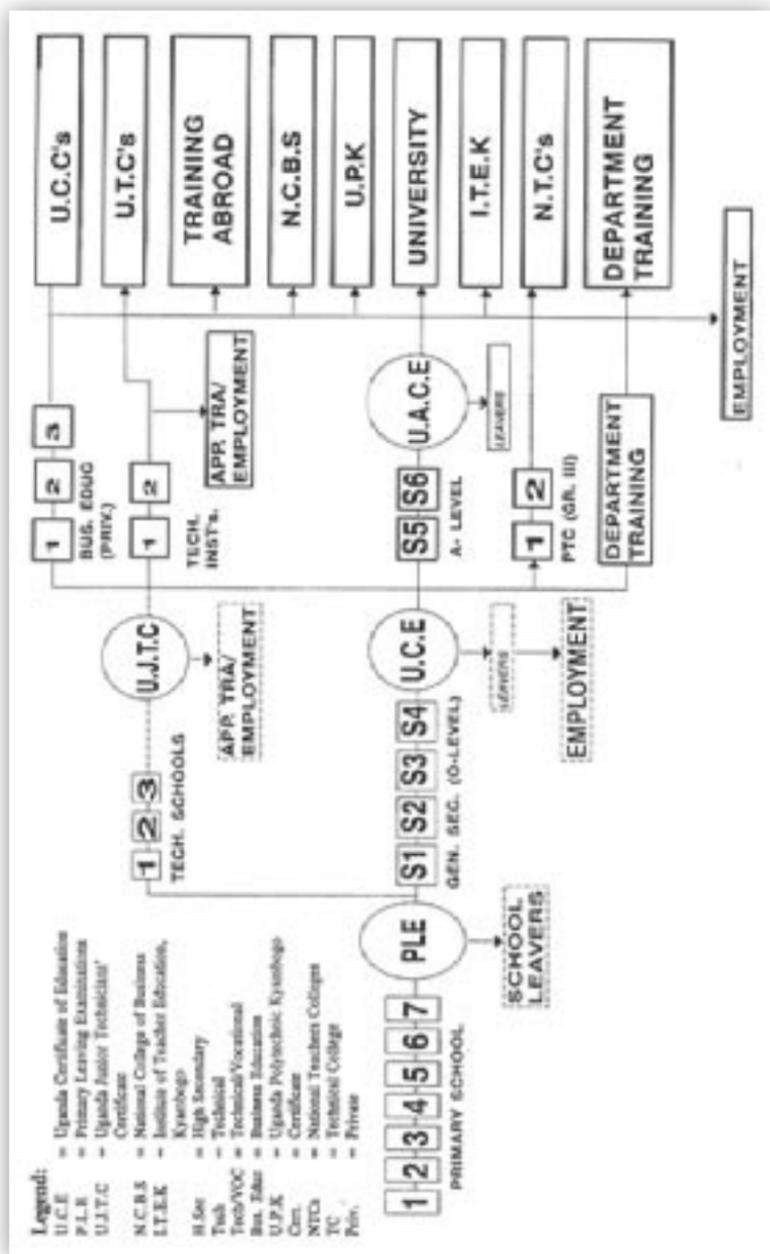
- Increasing access to quality primary schooling through UPE;
- Improving school management and instructional quality using well-targeted interventions such as the Teacher Development and Management System and Instructional Materials Supply (IMS);
- Strengthening planning, management and implementation strategies through organizational restructuring, ESIP, Education Management Information System (EMIS) and Poverty Action Fund programs. Actions taken towards this target included:
 - Providing an enabling environment for public and private sector partnerships;

- Strengthening the role of the Ministry of Education and Sports as the policy powerhouse and provider of the necessary back-up services to the district authorities;
- Building district capacity to ensure delivery of quality educational services.

Gender concerns are now mainstreamed into the overall educational plans. For instance, government directed that in each family at least two out of four children allowed free access to primary education should be girls.

The net effect of this positive policy framework is reflected in the increment of primary school enrolment from 2.7 million in 1992 to 7.2 million in 2002 (48% girls, 52% boys); the rise in the percentage share of the education sector in the national budget from 24.1% in 2001/02 to 24.9% in 2002/03; improved performance of primary pupils in the Primary Learning Examination (PLE), the increase in the number of Grade III teaching certificate holders from 51% in 1993 to 76% to date and the lowering of drop-out and repeater rates.

Figure 2.2. The existing structure of the education system



3. Planning and implementation of basic education reforms

The planning and implementation of PERP was hinged on its three reform pillars, each of which had a set of embedded initiatives and innovations designed to redress the problem of declining quality of basic education in Uganda.

PERP Pillar 1: Expanding access to quality learning opportunities

Under this pillar, two main reforms have been implemented: a Teacher Development Management System (TDMS) and Universal Primary Education (UPE).

TDMS Reform

TDMS is a primary teacher training delivery mechanism that combines the benefits of distance education and self-study techniques, using modules sandwiched with short face-to-face residential training. It provides pre-service training for untrained and under-trained teachers and in-service training and professional support for all serving teachers, head teachers, education managers and community mobilizers. It is thus a flexible, client friendly and well-resourced alternative teacher training approach that takes into account the evolving national and local priorities of education in Uganda.

Background to implementation of TDMS reform

The primary education teaching force in Uganda was inevitably one of the casualties of the country's politically and economically turbulent period of the 1970s and 1980s. The teacher attrition rate

soared, the number of untrained teachers who infiltrated the system increased, those who persisted in the system were underpaid and demoralized, and as a result teacher training colleges failed to attract students.

Many of the PTCs themselves lacked the requisite capacity to effectively run tailor-made training programs, owing to their inadequate human and material resource base and reliance on an overly academic curriculum.

TDMS objectives, design and implementation strategies

Objectives

The overall goal of TDMS is to improve quality and equity in primary education provision in Uganda by increasing access to quality learning opportunities and improving school management and instructional quality.

TDMS program design

TDMS is centered on a reformed Primary Teachers' Training College called a Core Primary Teachers' College (Core-PTC). The TDMS element of the Core-PTC is called the outreach department. This department is different from the traditional pre-service department, which runs the Primary Teacher Education (PTE) two-year residential course for O Level (Ordinary Level) school-leavers and up-graders. The outreach department employs a combination of distance education and short residential face-to-face sessions during the holidays to deliver the training.

The management and administration of the core-PTC is under a college principal, assisted by two deputy principals in charge of pre-service and outreach departments respectively. These departments are staffed by heads of programs to support Coordinating Center Tutors (CCT) in their program areas through training and counseling, maintaining student records and monitoring the program activities, organizing residential courses and materials development, and liaising with the ministry departments and other national bodies responsible for course development and assessment.

TDMS programs are implemented through a network of coordinating centers, each of which is coordinating a cluster of an average of 22 outreach schools. One school in each cluster is selected to serve as a coordinating center school.

The CCTs are provided with motorcycles or bicycles to facilitate their mobility. They are expected to visit each outreach school for at least half a day each month. They also relate with their local communities through Coordinating Center Committee meetings and are in regular contact with their respective district education offices.

The TDMS implementation strategies

TDMS has been implemented in six phases; the main activities comprised training, curriculum review, provision of instructional materials, infrastructure provision and equipment supply.

Training: This is intended to help reduce the number of untrained teachers as well as provide continuous support to all serving teachers.

While the pre-service mode is for upgrading untrained and under trained teachers, the in-service variant is for all serving teachers, head teachers, outreach tutors, community mobilizers and education managers. The program also conducts management training for head teachers, School Management Committees (SMC), Parent-Teacher Associations (PTAs) and District Education Officers (DEO) particularly district inspectors of schools.

Curriculum review: The upgrading and strengthening of the relevance of the PTE curriculum was accomplished through the establishment of a Curriculum Review Task Force, appointment of subject panels and production of self-study materials.

Provision of Instructional Materials: In order to maximize the supply and utilization of instructional materials, emphasis was placed on selective procurement and distribution of core textbooks, teacher guides, teaching equipment (blackboards, slates, video vignettes, etc.) to Core-PTCs, Coordinating Centers (CCs) and selected outreach schools.

Infrastructure Provision and Equipment Supply: There has been a phased construction of new infrastructure at the Core-PTCs, of classrooms in outreach schools as well as resource centers in all CCs. In addition, government undertook the rehabilitation and expansion of infrastructure in all Core-PTCs as well as the furnishing and equipment of Core-PTCs, CCs and selected outreach schools.

Implementation arrangements

Implementation of TDMS was done at national, district and institutional levels. The Coordinating Center was responsible for resource mobilization, overall program coordination, policy, financial management, procurement, accountability and monitoring and evaluation (see *Appendix 3.1*).

During the earlier phases of the TDMS program (phases I-III), the coordination function was being performed by the national coordinator located in the Project Implementation Unit. The coordination of its subsequent phases (phases IV-VI) was mainstreamed into the MOES. The Education Planning Department (EPD) and Teacher Education Department remain responsible for overall planning, coordination and monitoring and evaluation.

For their part, districts monitor the activities of the PTCs, CCTs and the outreach schools and give support to the head teachers. Through the DEO, they receive feedback from CCT activities and act as a link between the CCs and the center.

At the institutional level, there are presently 23 Core-PTCs responsible for TDMS implementation. The outreach department is responsible for monitoring outreach activities.

The Coordinating Center through the CCT is responsible for coordination and monitoring of all the activities within the cluster and submits monthly progress reports to the Core-PTC.

The outreach schools are charged with a task of translating into action the innovations infused by the program. The CCTs, head

teachers, district inspectors of schools (DIS) and SMCs oversee this translation process.

Implementation efforts are supplemented by periodic evaluations conducted by evaluation teams, evaluation studies commissioned by the MOES headquarters, and independent monitoring carried out by different departments of the ministry. The PTC also submits monthly progress reports to the ministry headquarters. The monitoring and evaluation reports are used to assess the pace and process of the TDMS reform.

Innovations associated with the implementation of TDMS

The TDMS has brought about a range of innovations, particularly in the training and empowerment of teachers, head teachers, tutors, education managers at various levels and the community. These innovations include the following:

New modalities for pre-service and in-service teacher training

Pre-service training is intended to upgrade untrained and under-trained teachers, based on a revised Primary Teacher Education course curriculum. This is an on-the-job training arrangement. The course duration is three years and leads to the award of a PTE Grade III certificate, a minimum requirement for teaching in primary schools in Uganda.

In-service training is targeted at all serving teachers (trained, under-trained and untrained), head teachers, outreach tutors, community mobilizers and education managers at all levels. Head teachers undergo a special one-year certificate course in basic management skills, while the rest undergo refresher courses intended to inculcate professionalism, introduce new educational innovations as well as provide opportunities for continuous professional development for teachers.

Both delivery approaches employ distance-learning techniques supported by self-study modules and interspersed with short face-to-face sessions and Peer Group Meetings (PGMs).

Outreach tutor training

This is aimed at training tutors who are deployed to render teacher outreach services at the Coordinating Centers. The graduates from this program mainly end up as Coordinating Center Tutors. The program only attracts Grade III teachers who have a potential to upgrade to Grade V with a view to becoming tutors. The training curriculum is based on the Diploma for Primary Teacher Education (DTE) course.

Voluntary community mobilization (VCM)

The training of the voluntary mobilizers was undertaken with a view to soliciting community support for primary education programs in the form of contributions towards constructing classrooms, monitoring school finances, and providing their children with scholastic materials, uniforms and meals. Two volunteers are trained per school and they sensitize their respective communities.

Clustering schools to provide professional support

All government-aided primary schools are now clustered and linked to Coordinating Centers. The Coordinating Centers are under the stewardship of the CCT, who resides within the Center itself. This enables him/her to more readily render teacher support services, to receive and immediately respond to issues raised by the teachers, and to counsel parents, community leaders and head teachers on the adoption of pupil friendly behaviors and practices.

UPE Reform

UPE is internationally defined as provision of free and compulsory basic education to all children of school-going age in a given country by the government in question. In Uganda, UPE was provided to four children per household. However, this has been re-defined to include all Ugandan children of school-going age. Both the government and the parents have financial obligations to meet. While the government is charged with the mobilization of resources, the payment of tuition fees, provision of infrastructure and instructional materials, as well as recruitment and training of teachers and devel-

opment of the curriculum, the parents provide scholastic materials, school uniforms and basic requirement for survival.

UPE is therefore, neither free nor compulsory, as there is no act of parliament making it obligatory for parents to enrol their children in school.

Background to UPE implementation

Prior to the actualization of UPE, the status of primary education in Uganda was dismally poor; the gross enrolment ratio for children 6–12 years old was only 69% in 1990; cohort survival rates were very low, especially for girls; about 40% of the primary teachers were untrained, and even those recognized as “trained” were not well trained; there was an acute shortage of instructional materials in schools; physical school infrastructure was in a state of disrepair; there was an inadequate provision of desks, chairs and other facilities. The burden of financing primary education fell heavily on the generally impoverished households; as well, the teachers’ pay fell far below the minimum living wage and there were glaring regional and gender disparities in the distribution of basic educational opportunities.

Objectives, design and implementation strategies of UPE

Objectives

The objective of Universal Primary Education in Uganda is to increase access, equity and quality of primary education in order to eradicate illiteracy and subsequently transform society.

Design

UPE was launched in 1997 as a national program aimed at providing free education to four children per family. It is being funded jointly by government, international development partners, and communities. It is implemented by the local governments and is comprised of five mutually interdependent components, namely: infrastructure expansion, payment of tuition fees, supply of qualified teachers,

review of the primary school curriculum, and increased supply of instructional materials.

Implementation strategies

Infrastructure provision. Government undertook to construct and furnish new facilities and complete unfinished classrooms. The new facilities included classrooms, pit latrines, and teachers' houses. Each new classroom was furnished with 18 three-seater desks. The following performance targets were set: classroom/pupil ratio of 1:54, desk/pupil ratio of 1:3, latrine/pupil ratio of 1:40, and at least four teachers' houses per school.

Government established a two-way conditional grant arrangement to finance this infrastructure expansion, the School Facilities Grant (SFG) and the Classroom Completion Grant (CCG). The SFG is meant to help the most needy school communities construct new essential infrastructure and supply furniture for the classrooms, while the CCG, before its cessation, targeted partially built primary classrooms. Parents also continue to supplement government efforts whenever possible.

Provision of Capitation Grants. In 1997 government took over the responsibility of payment of tuition fees for the children enrolled in only government-aided primary schools regardless of their family background. Government pays a capitation grant of 5000 Ugandan shillings per pupil enrolled in P1-P3 and 8100 shillings for those in P4-P7.

Capitation grants are financed under the recurrent budget of MOES and disbursed to the district as a conditional grant. The district distributes the grants to the schools in accordance with enrolment figures. Schools are mandated as per the MOES guidelines to utilize at least 35% of the grant on extra instructional materials, 20% on co-curricular activities (games, sports, music), 15% on school management (wall clock, registers, office consumables) and 10% on administration (imprest, hire of transport, utilities). The response to this government subsidy has been remarkable, with enrolment rising

sharply from 3 million in 1996 to over 7 million in 2002, as depicted in *Table 3.1* below:

Table 3.1. Growth in enrolments (1995–2002)

Year	1995	1996	1997	1998	1999	2000	2001	2002
Male	1,438,986	1,647,742	2,832,472	3,061,722	3,301,888	3,395,554	3,528,035	3,721,135
Female	1,197,423	1,420,883	2,471,092	2,744,663	2,986,351	3,163,459	3,372,881	3,633,018
Total	2,636,409	3,068,625	5,303,564	5,806,385	6,288,239	6,559,013	6,900,916	7,354,153

Source: Education statistical abstract 2002

Supply of qualified teachers. Remedial measures undertaken by government to augment the supply of qualified teachers included expanding the training capacity, improved management of the teacher payroll and expedited clearance of all teacher salary arrears.

Revision of the Primary School Curriculum. The old curriculum was recast to emphasize functional literacy and numeracy, effective communication skills in local languages and appreciation of diversity in cultural practices, traditions and beliefs.

The curriculum review process was spearheaded by the Curriculum Review Task Force and subject panels. The role of the subject panels was to design the teaching syllabi as derivatives of the revised curriculum. The new curriculum is comprised of two volumes, and it is now operational. Volume One is composed of the core subjects of English language, integrated science, mathematics and social studies (SST), while Volume Two contains integrated production skills (IPS), Agriculture, Kiswahili and mother tongue, music, dance and drama, physical education and religious education. The new learning package is tailored to the local realities and encourages participatory learning.

Instructional Materials Provision. The introduction of UPE underscored the need to increase the supply of instructional materials to primary schools and PTCs. To supplement the centrally provided stocks, a proportion of UPE capitation grants (35%) has been set aside for schools to purchase supplementary materials (mainly supplementary readers, teacher reference books, wall charts, chalk,

blackboards, etc.) in line with established UPE capitation grant expenditure guidelines.

Implementation arrangements

UPE activities are operationalized at national, district and school levels. The roles of the actors at these respective levels are summarized in *Table 3.2* below.

Table 3.2. Summary of UPE implementation

Component	Strategies	Activities	Arrangements	
			Actors	Roles
Infrastructure provision	<ul style="list-style-type: none"> - Construction of new facilities (classrooms, Teachers houses and pit latrines) - Completion of classrooms - Parents and community supplementing towards infrastructure provision 	<ul style="list-style-type: none"> - Preparation of work plans - Procurement of contractors/ suppliers of furniture. - Disbursement of funds - Accounting and reporting - Monitoring and evaluation 	MOFPED	<ul style="list-style-type: none"> - Communicates the SFG ceilings - Disbursement of funds to districts - Monitoring activities - Provision of technical assistance
			MOES	<ul style="list-style-type: none"> - Approves the district annual work plans and budgets - Monitors use of the grant
			District/ municipality	<ul style="list-style-type: none"> - Prepares, reviews, approves and submits the district annual work plan for SFG - Signs letters of understanding between the district and MOES - Carries out field appraisals - Procures and pays project contractors - Operates the SFG bank account
			SMC	<ul style="list-style-type: none"> - Prepares sub-county work plans

Capitation grant	- Resource mobilization and disbursement of funds	- Disbursement of funds - Accounting and reporting - Supervision, monitoring, and evaluation	MOFPED	- Communicates the UPE district budget ceiling - Disbursement of the grant as a conditional grant - Gives technical support to the district on request - Monitors districts
			MOES	- Analyzes and approve district annual work plans. - Verifies enrolment figures - Monitors the districts and the schools
			District	- Disbursement of funds to schools - Consolidates sub county work plans
			Schools	- Prepares school UPE annual work plan - Manages the UPE bank accounts - Provides school enrolment to the district
Provision of qualified teachers	- Formulates teacher requirements plan by district - Rationalization of teacher requirements with the budget - Disbursement of wage bill funds to districts as a conditional grant	- Identifies and declares vacancies in schools - Forwards vacancies to district service commission - Application for vacancies is done and short list made - The district service commission interview the applicants - Submission of names to the public service commission - Public service commission includes the manes in the payroll	MOFPED	- Make budgetary provisions for education sector - Disburse funds for teachers' salaries to districts
			MOES	- Set teacher ceilings against budget provisions by MOFPED - Communicates staff ceiling to the district
			MOPS	- Management of the payroll
			DSC	- Advertising job vacancies - Interview teachers - Short listing teachers - Appointing teachers
			CAO	- Declares vacancies to DSC - Deploys teachers - Communicates staff ceilings to the DEO
			DEO	- Identifies vacancies and declares them to the CAO - Communicates staff ceilings for the schools
			Head Teachers	- Communicates teacher requirements to the DEO - Initiates process of placing teachers on the payroll

Source: MOES

Innovations associated with the implementation of UPE

The implementation of UPE has brought with it new departures from some traditional practices in the running of basic education services in the country. The main changes relate to strategies for education of disadvantaged children, a package for teachers in hard-to-reach areas, shift of responsibility for payment of PLE fees, contingency planning for provision of basic education in conflict areas, multi-grade teaching and double-shift teaching.

Formulation of strategies for education of disadvantaged children

Although UPE was initially meant to benefit all school-going age children (6–13 year olds), it did not succeed in attracting all of them as envisaged, due to social exclusion. Social exclusion in Uganda is caused by disability, geographical location, culture, ethnicity, language, and conflict. These have created groups of disadvantaged children such as refugees, physically and mentally handicapped children, children of nomadic societies and those in urban poor areas.

Several specially targeted interventions have been effected to remedy the issue of under enrolment among such socially marginalized children. These include:

Alternative Basic Education for Karamoja (ABEK). ABEK is a program designed specifically for the marginalized population of Karamoja (a nomadic society) to overcome its cultural resistance against formal school system.

Basic Education for Urban Poverty Areas (BEUPA). This is a non-formal basic education program targeted at out-of-school children in the main urban areas in the country. It is currently being implemented in Kampala.

Complementary Opportunities to Primary Education (COPE). This is another non-formal education program designed for children aged 10–16 years who have never attended school or who had enrolled but dropped out before acquiring basic skills and literacy.

Special Needs Education. Education of children with special learning needs has been prioritized, and a department to cater to their needs has been created within the MOES. This includes the education of children with hearing impairment, visual impairment and mental retardation. Education of children with physical impairment has been integrated to the country's mainstream basic education system.

Affirmative Action in Support of the Girl Child. In its bid to ensure gender equity in basic education, government has implemented a series of grassroots campaigns aimed at increasing enrolment of girls. In addition, Uganda embraced the Girls' Education Movement (GEM), which is an Africa-wide movement that was launched in 2001 to promote quality education for girls. It focuses on enhancing girls' enrolment rate, developing their leadership and technical skills, assisting girls with special needs, and mobilizing communities to support girls' education.

Package for teachers in hard-to-reach areas. This is an incentive scheme designed to attract teachers to accept deployment to remotely located areas that they have hitherto avoided. These include areas with harsh climatic conditions, poor and unreliable transport, and communication networks, difficult terrain, nomadic populations, insecure and hostile communities and those lacking basic social amenities.

Shift of responsibility for payment of PLE fees. At the inception of the UPE program, parents continued to shoulder the responsibility of payment of PLE fees. Although the figure of 6100 shillings (US \$4) was deemed affordable, the reality was that many parents, particularly in rural areas could not meet it, and this contributed to a worsening of school dropout-rates. In 2000, government assumed full responsibility for payment of PLE fees.

Contingency planning for provision of basic education in conflict areas. This idea was introduced to forestall the disruptive effects of armed conflict and civil unrest on the education of children in insecurity-prone areas.

Multi-grade teaching. This is a coping mechanism designed for the underenrolled and the understaffed schools in sparsely populated areas. It involves the teaching of different grades in one classroom by one teacher.

Double-shift teaching. Double-shift teaching is a cost-saving delivery mechanism with two groups of morning and afternoon students who utilize the same school facilities, teachers and instructional materials, alternating at little or no extra cost.

PERP Pillar 2: Improving school management and instructional quality

The two reforms implemented under this pillar are improving the provision of instructional materials to schools and improving school management capacity, which was already discussed under Pillar 1. This section will therefore focus on describing the implementation of the activities related to provision of learning materials to schools, which includes and the revitalization of private sector printing and publishing.

Improving the provision of learning materials to school

Learning materials are critical inputs in the teaching–learning situation because they provide information, organize the scope and sequence of information presented and offer opportunities to pupils to synthesize what they have learned. They include textbooks, teachers’ guides, supplementary reading and curriculum support materials, essential reference books (atlases and dictionaries), teachers’ pedagogical support materials, and teaching and learning aids (non- textbook materials). The initiatives in this area have mainly focused on the procurement and distribution of core textbooks and teacher guides.

In order to revitalize private sector publishing and printing, deliberate efforts were taken to build local capacity by training private publishers and printers, staff of the Instructional Materials Unit (IMU)

and the staff of National Curriculum Development Center (NCDC). Study tours and provision of relevant equipment were used to reinforce the effect of training.

These national initiatives are largely being planned at the ministry headquarters in collaboration with key stakeholders (donors, district representatives, etc.).

Background to instructional materials supply

Although serious efforts were made in the 1960s to create capacity to mitigate the chronic problem of shortages in schools, the newly created parastatal, the Milton Obote Foundation, which had been mandated to accomplish that objective, ended up assuming monopoly powers in selection, procurement and distribution of instructional materials. This stifled local authorship and publishing capacities and exacerbated shortages in supply. This scarcity problem reached crisis point during the politically and economically chaotic period of the 1970s and 1980s.

Objectives, design and implementation strategies and arrangements

The overall objective of this reform is timely procurement and supply of the recommended learning materials that conform to the official Uganda Primary Education Curriculum. More specifically, it is designed to:

- Purchase and distribute four approved books (one per subject) in quantities sufficient to attain the Pupil Book Ratio (PBR) of 1:3 in the lower primary (P1-P4) for all schools;
- Purchase and distribute teacher guides;
- Provide sets of student textbooks and teacher guides to Primary Teacher Colleges; and
- Prolong the useful life of textbooks through a book management course in the pre-service and in-service teacher training curricula.

The Ministry of Education and Sports, through the Project Implementation Unit, oversaw and coordinated the activities designed to achieve those stated objectives before the Instructional Materials Unit was subsequently granted its independence. The IMU consolidates textbook orders, undertakes central bulk purchasing, distributes the textbooks to the districts, trains the district education staff on the utilization and conservation of instructional materials, and monitors their utilization, conservation and stock management. At the district level, DEOs are responsible for consolidating individual book orders for schools, submitting the consolidated book orders to the IMU and monitoring textbook utilization at the school level. Finally, at the school level, the head teachers, in collaboration with the subject heads and class teachers are in charge of identification and compilation of the lists of textbook requirements.

Innovations associated with the initiatives for improving instructional quality

- The IMU is putting in place more user friendly and cost-effective methods of procuring and delivering the needed instructional materials. Schools are actively involved in decision-making at various stages of the textbook procurement process. This participatory approach allows for optimal utilization of the instructional resources received.
- The shortening of the procurement cycle from 18 to 12 months has helped to expedite the process.
- A decentralized approach to the procurement of learning materials is being piloted in the districts of Masindi, Lira, Rakai and Kumi under the supervision of IMU.
- Besides the capacity-building initiatives undertaken for the IMU, the printing and publishing industry has been fully liberalized.

PERP Pillar 3: Strengthening planning, management and implementation

The reform thrusts under this pillar relate to the revamping of planning and policy analysis, management and information systems and implementation capacities.

Background of strengthening planning, management and implementation

The instabilities and civil strife that typified the 1971–1985 period generally undermined managerial capacity in Uganda, especially through brain drain, budgetary cuts, unavailability of accurate and reliable data, poor record keeping and poor data quality control and editing. This almost led to total collapse of the planning and managerial capacity in the education sector.

This explains why EPRC recommended the mitigation of those institutional problems by strengthening planning, management and implementation capabilities at all education levels.

This interventionist program had four major thrusts: strengthening planning and policy analysis, upgrading management and information systems; building project implementation capacity, and reforming curricula and examinations.

Strengthening planning and policy analysis

The primary objective of this initiative was to strengthen the Education Planning Department within the MOES to enable it carry out its recurring functions of conducting and analyzing annual school census results, budget preparation, school mapping and the tracking of educational finance and expenditure at the primary school level. The activities undertaken to realize this objective included: the upgrading of EPD to a full-fledged department with professional sections headed by technical staff; the development of a new National Assessment of Educational Performance (NAEP) instrument; the effecting of two specific policy studies to inform book policy and

secondary education development; staff development and training; and complete computerization and retooling of the department.

Each of the four sections within EPD performs a specialized function; for instance, the statistics and data processing section conducts annual school census and the statistics obtained form a basis for the development of performance indicators. Conversely, the monitoring and evaluation section carries out sector-wide monitoring and evaluation activities in conjunction with the Primary Education Department and the Education Standard Agency (ESA). The other two sections are in charge of project preparation, and finance and budgeting. The district level performance of these specialized functions lies with the District Education Office, with EPD's back-up support. The local council secretaries for education and SMCs conduct monitoring at the school level.

Upgrading management and information system

This reform had twin objectives:

- Strengthening the administrative systems throughout the education sector and training top- and middle-level managers in the general principles of management and the use of those new administrative systems. In addition, the reform spearheaded the development of management training materials, the development of a training and diffusion network utilizing the TDMS approach and the training of trainers (ToTs) in management techniques. A new in-service management capacity was established within the TDMS division of the PIU to oversee the development and implementation of management training programs from the ministry to school levels. However, much of the work is actually being undertaken by Core-PTCs, local management training institutions, and consultants. Technical assistance, equipment and study visits for middle and senior level managers were also provided.
- Financing the design and implementation of new information systems, including personnel records, accounting and auditing

systems from school levels through the district and the MOES. An attendant management information system has been developed to make personnel and finance data readily accessible for planning, programming and budgeting purposes at all levels. Technical assistance and computer, copying and printing equipment have been provided at the district and the MOES levels to support this activity. The ministry staff have been trained on how to use the new data capture application (Integrated Data Entry Application). Although the data collection process has been decentralized to the districts, the central ministry monitors and oversees the whole exercise.

Reforming the curricula and examinations

In this area of curriculum reform, NCDC was the key implementing agency. The purpose was to support the development of a client friendly, relevant primary school curriculum together with a package of matching textbooks, teacher guides and supplementary reading materials. The broadened new curriculum is now being implemented by the schools using a new set of textbooks for English, mathematics, science, social studies, agriculture, integrated production skills, performing arts and physical education, religious education, local language and Kiswahili. NCDC collaborates with the district education officers to monitor and evaluate the implementation of the curriculum.

Regarding examination reform the principal actor is the Uganda National Examinations Board (UNEB). The major objectives are to:

- Promote quality teaching in schools to achieve the objectives of the revised school curriculum through improved assessment procedures;
- Assist in improving the quality of education by providing useful feedback to the relevant actors within the education system;
- Contribute to an objective assessment of changes in pupils' learning achievement at the national level.

UNEB has accordingly pursued a multidimensional response, which includes:

- Continuous Assessment of the progress made by each pupil. The information obtained is used for immediate remedial action;
- National Assessment of Progress in Education (NAPE). This is a monitoring and evaluation program that is periodically and jointly carried out by UNEB and EPD to provide comprehensive, up-to-date, reliable sample data on many educational indicators at various stages of a pupil's education. In this way, it identifies some of the key factors that influence pupils' educational achievements and progress;
- Validation and monitoring studies on the quality of examinations;
- Assessment of Higher Order thinking Skills (HOTS);
- Improvement of dissemination and utilization of information;
- Establishing a headquarter building and a printing press;
- Training of the staff.

Building project implementation capacity

The prime objective of this reform was to reorganize the Project Implementation Unit within MOES. The PIU was expanded and given additional office space. Its managerial capacity was upgraded through training programs, recruitment of professional engineers and procurement of equipment and vehicles. Internal operations were reorganized in order to realize economies of scale. These have been accomplished through initiatives that include strengthening the Education Planning Unit, building capacity for national assessment of education performance, undertaking a book sector review exercise, conducting the secondary education study, upgrading management and information systems, reforming the primary education curriculum and examinations and strengthening implementation capacity. These initiatives were realized through the PETDP.

As it was with the other two pillars of the PERP, initiatives under Pillar 3 were planned and executed centrally.

Innovations associated with implementation of initiatives under Pillar 3

Within the strengthening of planning and policy analysis concern, the following innovations are discernible:

Development of a Policy Framework for Aid Coordination to the Education Sector

In order to ensure continuity and complementarity of funding to the entire education sector, a sector-wide investment program called Education Sector Investment Plan (ESIP) was developed. ESIP is now the basis of all future assistance to the education sector in Uganda, and it has provided a coherent foundation for defining the shared policy goals of the funding agencies and government, as well as financing commitments needed to achieve them.

It is a platform upon which donors channel resources to the education sector through the national budget. ESIP has also provided a forum for a range of actors and competing interests to work together for the development of education in the country.

Integration of the Sector-Wide Approach to Planning (SWAP)

The sector-wide approach is a holistic approach to planning. It involves a clear definition of roles between government and funding agencies. Under SWAP, all significant funding for a given sector is pooled to support a single sector policy and expenditure program in accordance with the accountability procedures set by government. This process has been institutionalized in Uganda since 1998 and for the education sector, it has been operationalized under ESIP. ESIP is now both a rolling plan and a comprehensive policy framework for the education sector that has the blessings of all the key stakeholders.

Formulation of the medium term budget framework (MTBF)

The Medium Term Budget Framework is a three-year annual rolling plan for resource and expenditure management. A given resource is given to the education sector by the Ministry of Finance, Planning and Economic Development in the Medium Term Expenditure Framework (MTEF), which has to be allocated to the different sub-

sectors by program items in the case of recurrent expenditure, and by project items in the case of development expenditure.

The MTBF is outcome/output-based with defined units and unit costs for inputs. It has developed cost-efficient strategies to achieve the outputs.

Under the Management and Education Information System reform, the attendant innovations included:

Introduction of results-oriented management (ROM)

Prior to the operationalization of ROM, the management style at all education levels was typically bureaucratic, time consuming, demotivating and non-participatory. ROM was initiated to modernize and improve the management culture in the MOES by subjecting measurable outputs to performance indicators against which resources are mobilized and expended. As an output-oriented management approach, ROM has helped the ministry to refocus its attention on its mission statement, enhanced accountability and improved its overall efficiency and effectiveness in service delivery.

Introduction and operationalization of EMIS

The Education Management Information System is a computer-driven system set up to help monitor and evaluate the implementation of education sector programs. It is the single most important management tool, providing most of the data and information needed for decision-making and educational planning at all levels.

EMIS is a sector-wide decentralized initiative, which has facilitated the generation and processing of dependable data, particularly relating to schools, pupils, personnel and finance management.

With regards to the resuscitation of the implementation capacities within the education sector, the innovations are mainly those associated with the initiatives:

- Aimed at increasing both financial and human resource inflow into education. For example, through the PAF, basic education financing has effectively been mainstreamed into the much

broader national poverty eradication programs. Community financing is now an operational alternative strategy for meeting the costs of basic education. Above all, government has put in place a flexible, user friendly mechanism for the disbursement of funds from the center to the districts.

- Geared towards the creation of an institutional framework and systems of governance that are not only technically competent but also ensure transparency and accountability.

4. Quality changes that have resulted from implementation of reforms under PERP pillars

Introduction

This chapter summarizes the quality improvements that have occurred as a result of implementing the three pillars of PERP in the last decade.

As a country that emerged from decades of political chaos and economic decline, Uganda's sustained commitment to prioritizing PERP in its socio-economic development program, which has resulted in impressive investments in primary education, is admittedly an enormous and unique achievement, for which Uganda should be very proud. Real improvements in pupil learning conditions have occurred and are taking place daily across the country as a result of the reform. For the first time in Uganda's brief history as a nation-state, concerted efforts have been taken to develop and adapt basic education to the evolving needs of the nation's children.

The study has benefited from a number of independent evaluation studies that have been conducted in the various components of PERP. The most recent and noteworthy of these include the Annual and Final Report of Institutional and Organizational Development Advisor, Ian Smith (1999); Gender and Primary Schooling in Uganda (1999); the UNESCO-funded Education For All 2000 Assessment (MLA Project 1999); National Assessment on Progress in Education (UNEB 2000); Summative Evaluation of TDMS (2001); The Summative Evaluation of PETDP by the World Bank Mission (2001); The Joint Evaluation of External Support to Basic Education in Developing Countries commissioned by 13 external funding agencies (2002); Review and Evaluation of USAID/Uganda Support to the Uganda Primary Education Reform (SUPER) Program

with a focus on impact of Non Project Assistance (NPA) component (2003); Mid-term Review of Education Strategic Investment Plan (ESIP) in Uganda – (GoU 2003); and Review of UPE implementation (GoU 2003).

Each of these studies, however, differs in terms of methodologies used, scope and timing. Regarding scope, most of these studies have tended to be partial analysis of the reform outcomes. They were also accomplished against a context of a relatively more dynamic policy environment, which has rendered some of their conclusions obsolete.

In that sense, therefore, this particular study is unique because of its holistic coverage of the PERP and its timing in a relatively stable socio-economic setting. It is also well placed to benefit from a lot of hindsight and reflections spanning the entire reform period.

The main gains from PERP have been realized in the areas of human and material resources, practices, outputs and outcomes. They are seen at all levels involved in its implementation, particularly at the national, district, Core-PTC and school levels. This is supported by findings from a number of studies. For example the USAID study on the impact of Non-Project Assistance (NPA) to the education sector confirms that PERP has resulted in seven areas of improvement in: teachers' terms and conditions of service; teacher education; instructional materials and cost-effective textbook procurement policy; enhanced community participation; girls' education; increased public funding of primary education; and improved financial management and planning.

Quality changes in human resources

Primary teachers

At the inception of PERP in 1993, untrained and under-trained teachers constituted nearly 50% of the teaching force in Uganda. Low and irregular wages for teachers made it hard to recruit and retain qualified teachers, particularly in rural areas. There were almost no incentives for potential teacher trainees to join the teaching

profession, as teaching was considered a profession of last resort. A system for upgrading serving untrained and under-trained teachers and continuous professional support and development for serving teachers was almost non-existent, and most teachers were not housed within the schools they were teaching. This downgraded the quality of teaching and reinforced regional disparities in the provision of basic education, since the burden of financing education was in the hands of the local communities.

In addition, the primary teacher payroll was poorly managed, causing delayed access to it by teachers. It also lacked checks and balances leading to the increasing phenomenon of “ghost teachers.”

The implementation of PERP has boosted teachers’ morale, promoted equity in the distribution of qualified teachers across the country and revitalized the primary teaching profession in Uganda by:

- Restoring the status and integrity of teachers through training, continuous professional support, targeted incentives and better management of the teacher payroll;
- Increasing the output and supply of qualified teachers. The TDMS program has given untrained and under-trained teachers an opportunity to upgrade their qualifications without the risk of job loss. Consequently, the percentage of unqualified teachers has decreased by half from 50% in 1993 to 25% currently;
- Ensuring a fairly equitable distribution of primary teachers across the country through implementation of school staff ceiling formula. This system has provided a framework for systematic staffing of primary schools, and it has been used to determine the annual recurrent budget for the primary teachers’ wage bill. It is also an effective tool for detecting “ghost teachers”;
- Improving the welfare of teachers by upgrading the salaries of qualified teachers from 11000 Ugandan shillings in 1992/1993 to 105000 shillings to date. This represents a tenfold increase in nominal terms over a period of ten years. The salary reforms have been meaningful to teachers as evidenced by both increased enrolment in PTCs and reduced teacher attrition rates;

- Providing incentives for untrained and under-trained teachers to upgrade to Grade III Certificate. In Uganda, the legal minimum requirement for teaching at primary schools is a Grade III Certificate, which is obtained after undergoing pre-service teacher training course at a Primary Teachers' College for two years. Before the reform, only those who had successfully completed secondary school education (O level) were eligible. Through the outreach component of the TDMS program, serving untrained and under-trained teachers have been provided with an opportunity to upgrade their qualification through the convenience distance education delivery approaches. This has provided security and family stability to the teachers involved.

Teacher educators

By the early 1990s, PTCs were under-staffed and the tutors in-post were mainly under-trained and worked part time. Under the TDMS program, a network of Core-PTCs and associated Coordinating Centers have been created. Tutor training wings have been added to two Core-PTCs of Gulu and Bushenyi to specifically train tutors for deployment at Coordinating Centers. As a result, these institutions are now staffed with a large team of well-trained tutors who have been specially inducted to implement both pre-service and in-service teacher training programs. There is now, therefore, a sustainable pool of qualified teacher educators.

Education managers

Prior to the reform, the capacity for planning, policy analysis, national assessment of education performance, education research, general and financial management was inadequate at all levels. The need to create critical managerial capacities could hardly be overstated.

Using a combination of training approaches (both in-country and abroad), study tours, provision of targeted and demand-driven technical assistance, and on-the-job training, capacity has been built, particularly at the districts, where they are taking over increasing responsibility for implementing all basic education activities. The

most significant and sustainable outcome of such capacity-building activities is the development of training modules and guides for the training of head teachers as well as School Management Committees and Voluntary Community Mobilizers using the TDMS network. This has enhanced both accountability and transparency in the management of the sub-sector.

The community

For a long time, parents' involvement in the education of their children remained peripheral and limited to payment of fees and Parent-Teacher Association contributions. To reverse this trend and encourage greater community participation, the reform supported initiatives for the development and dissemination of materials outlining the key responsibilities of the stakeholders. Two Volunteer Community Mobilizers (VCMs) were identified in each primary school and trained in techniques for community mobilization. Over 36000 of these VCMs have been trained nationwide. Through their awareness-raising efforts at community gatherings, VCMs have helped to transform community attitudes towards education.

Pupils

Not only has the government's UPE program attracted massive school enrolments, it has also improved the cohort survival rates. Other limitations notwithstanding, the mere exposure to a schooling process creates an opportunity for the participating child to acquire self-empowering qualities through wider socialization.

Quality of material resources

The problem of shortages in the supply of material resources, especially infrastructure, equipment and instructional materials which characterize the 1980s and 1990s has been largely resolved through PERP. The improved quality of school buildings, textbooks, teacher guides, equipment and other teaching aids has positively impacted on the teaching-learning environment.

Infrastructure development and supply of equipment

Both the stock and quality of infrastructure and equipment at various levels of education system has been improved, particularly at the school level. Infrastructure development at the school level is now supported centrally through SFG (to fund new construction) and UPE capitation grants provided to each school as replacement revenue. Infrastructure development is an integral part of the TDMS program.

As a result, a new office block has been constructed for UNEB at a cost of over US \$2 million and furnished with modern equipment and internal security printing facility. This has helped to minimize costs and examination leaks.

At the district level and through the district capacity building project, new office blocks to house the education departments have been constructed for all 11 newly created districts.

The environment under which teachers train has improved following the rehabilitation, expansion and upgrading of Core-PTCs, and the construction of coordinating centers and teachers' resource centers. These are fully furnished with the necessary training facilities, and essential equipment has been provided. The processing of information has improved through provision of computer equipment to all Core-PTCs. As well, the monitoring and supervision of program activities have improved as a result of vehicles being supplied to district education departments and motorcycle/bicycles to the CCTs.

Hygiene and sanitation standards have been improved through the construction of more pit latrines and the subsequent reduction of the pupil/latrine ratio. The health standards of schools have further been improved through the provision of clean, piped water, bore holes and rainwater tanks.

The construction of teachers' houses within the vicinity of the school has had a strong motivational effect on the teachers and has renewed their commitment to the profession.

All the ministry departments and district education offices have been supplied with computing equipment, accessories and fax machines to ensure information flow between the ministry and the districts. Proper storage of information has been guaranteed with the supply of filing cabinets to the Center and districts.

Instructional materials

Through systematic policy reforms designed to address the issue of learning resource constraints in the country, a sustainable book selection, procurement and distribution system has been established based on open competition and involving the school. Thus, the stock of core textbooks and instructional materials that meets minimum supply and quality standards has been built.

A decentralized management system that fosters school-based decision-making in the cost of instructional materials has been established. This system has been enhanced with the formulation of minimum standards for supply of basic education materials.

Perhaps one of the greatest achievements with regards to providing learning resources to primary schools in the last decade has been in the liberalization of the procurement process. This has resulted in dramatic reduction in the price of book materials, the end of monopolies and the revitalization of local publishing and authorship (see *Text Box* below).

Financial resources are now being offered to cover replacement costs of core textbooks and for co-financing of new textbooks under UPE. Initial stocks of textbooks needed for the new curriculum have also been made. For the first time in Uganda, a recurrent budget for the supply of instructional materials was created in 1998/99 and this has been sustained to date.

The impact of PERP on the provision of learning materials

- An open competitive bidding process for all learning materials has been established. This has resulted into over 50% reduction in the price of textbooks.
- Teachers participate in the selection of learning materials.
- Monopolies in textbook development, publishing and distribution have been broken.
- Local authorship and publishing has been revived. Before the reform, there were only two local publishers but today, they are over 20.
- Retail outlets for learning materials throughout the country have been stimulated. Before the reform, all retail outlets were based in Kampala; today there is at least one in each district.
- The quality of learning materials has been enhanced, aligned with the curriculum. The curriculum is based on local experiences and is gender sensitive.
- The procurement cycle for books has been reduced by more than three months.
- The establishment of the line item in the education sector recurrent budget and the reforms undertaken have created a base for sustainable provision of learning resources.

Quality of practices

Teaching and learning practices

The quality of teaching has improved through the increased supply of qualified teachers. This has been ensured by the TDMS program, which introduced new approaches of delivering trained teachers through the pre-service and in-service training programs. This arrangement has made it possible to produce teachers in the most cost-effective manner to both the government and the trainee.

Students' increased accessibility to textbooks and the provision of teacher guides has helped to streamline teaching–learning process by creating great scope for more child-centered interactive learning as opposed to the traditional teacher-dominated instructional methodology.

The development of resource centers under the TDMS program has especially improved the use of such interactive approaches and the development of locally produced learning resources. This has introduced the concept of learning corners in classrooms, resulting into “talking classrooms” (classrooms with charts, diagrams, maps, objects, etc. to aid learning).

General management practices

Sector-Wide Approach to the management and financing of education sector activities has created a basis for the collaboration of key stakeholders in the development of the sector and for building capacity at the district and school levels for implementation of basic education programs. The new system promotes regular consultation among all the key actors. This has strengthened partnership particularly with funding agencies and the private sector.

Policy formulation and analysis has been institutionalized as a management practice at all levels, particularly at the ministry headquarters. The creation of new structures under Education Sector Consultative Committee (ESCC), Education Funding Agency Group (EFAG), Sector Working Groups and Bi-annual Education Sector Reviews, which emphasize the sharing of researched information and consensus building, has strengthened participation and informed decision-making.

At all levels of management, education is being managed proactively. Studies to identify problems are periodically carried out to guide remedial action. In addition, long-term planning has been institutionalized as a framework for making policies operational, increasing the involvement of other key stakeholders, mobilizing resources and implementing education programs.

Financial management

The implementation of various innovations such as UPE, regular audits of education sector expenditure, introduction of district budget reforms and reform of the teacher payroll, mentoring of district- and school-based education managers on financial management and accountability has improved financial management capacity at these levels. In addition, tailored training programs for head teachers and guidelines for School Management Committees have been designed aiming at imparting financial management skills among these actors.

Teacher training

Under TDMS, teacher training methodologies emphasize self-study, peer group discussion and creativity. Untrained and under-trained teachers are now being upgraded on the job. Pre-service and in-service teacher training have been integrated for uniformity and effectiveness.

Monitoring and evaluation

School effectiveness, teaching/learning practices and community participation are being gauged using objective national standards. Progress in the education sector is reviewed bi-annually through the Joint Education Sector Reviews (ESRs). Pupils' learning achievement for P3 and P6 is now being observed every three years through the National Assessment of Progress in Education program.

Management of national examinations and assessment

National Examinations and Assessment Systems are now being used as means of teaching rather than a device for screening. They also focus on testing Higher Order Thinking Skills (HOTS), as opposed to recall of facts.

To avoid leakages, national examinations are printed in a security printing facility owned by the National Examinations Board. To minimize examination malpractices, validation and monitoring

studies are conducted during examination period and the results are immediately acted upon.

After the release of each examination result, feedback on pupil performance is given to the schools for future corrective action.

In the area of national assessment, UNEB conducts NAPE surveys every three years. These are tracer assessment surveys that follow a cohort of pupils after three-year interval (at P3 and P6). These assessments focus on pupil learning achievement levels in four core subjects of the curriculum.

Quality of results

Financial management

PERP has resulted into the doubling of budgetary financing for primary education over a period of just ten years. Public expenditure for education has significantly increased from about 15% of the total recurrent budget with 18% of the total sector budget allocated to basic education in 1993, to over 31% of the total recurrent budget allocated to the education sector, with 65% of the sector allocation devoted to basic education in 1998/1999.

The provision of instructional materials has been incorporated as a budget line item with a view to ensuring its sustainability.

TDMS outreach teacher training activities have for the last four years been integrated into the recurrent budget.

As a consequence of PERP, per pupil expenditure for basic education has risen from US \$2.86 (3,378 Ugandan shillings) in 1993 to US \$19.00 (33,039 shillings) in 2001. The revision of the Capitation Grants formula for the 2003/04 fiscal year was expected to boost this unit cost.

Planning

In the area of planning and policy development, the Ministry of Education and Sports has been able to develop a sector-wide investment plan known as ESIP that has become a policy framework for managing aid coordination to the education sector. Basic education constitutes the biggest component of ESIP. ESIP provides a coherent basis for synchronizing policy goals of funding agencies with those of government, including financing commitments necessary to achieve them. Through ESIP, therefore, funding agencies can now channel resources for education activities through the national budget. The planning process for provision of infrastructure, teachers, and instructional materials has been devolved to the school level.

Management

Head teachers and teachers have been updated on new innovations in education through Continuous Professional Development implemented through workshops, seminars and short refresher courses. This has enabled them to cope with the challenges of large school enrolments, multi-grade teaching, and continuous assessment of pupils, ensuring equity in the classroom and shaping the moral behavior of pupils without recourse to corporal punishment.

Implementation

The implementation arrangements for basic education programs have been devolved to the lower management levels while the center retains the responsibilities of resource mobilization, policy generation, monitoring and evaluation. For example, a liberalized system for book selection, procurement and distribution, guided by school-based prioritization, has been established. The private sector is now more involved in the development of the local book market and a decentralized procurement process has been successfully piloted in four districts of Lira, Rakai, Kumi and Masindi.

An Instructional Materials Unit has been created to manage the procurement and distribution of instructional materials while main-

taining central control. The minimum national standards to ensure quality and cost effectiveness have been defined.

Monitoring and evaluation

At the Center, computerization of education statistics section has enhanced data collection, processing, analysis and reporting. It is now possible to accomplish the whole cycle of data collection, processing, analysis and reporting within a period of eight months, an exercise that previously lasted over one year.

EMIS has helped to establish a set of procedures and training modules that allow the ministry to replicate, track and control the level of data accuracy throughout the system. Availability of timely, reliable and accurate data has made it possible to produce dependable budgets for basic education, as well as carry out adequate monitoring of the activities undertaken. The flow of information in the ministry has been made faster because all the ministry computers are connected to the Local Area Network and Internet.

It is now easy to compute global indicators that measure the quality of learning in primary education (pupil/teacher ratio, pupil/textbook ratio, pupil/classroom ratio). Current indicators show that the pupil/teacher ratio calculated nationally for government grant aided schools is 54:1; the pupil/textbook ratio for government schools is 5:1 for lower primary and 3:1 for upper primary.

Vehicles have been provided to education managers to monitor and evaluate various activities of basic education.

Teacher training

The systematic reforms created in the teacher education sub-sector have helped to create a cadre of qualified and committed teachers. There is now potential for real school change that will enhance pupil performance and achievement levels.

Teaching and learning practices

The teaching and learning environment has been progressively made more conducive as a result of construction and furnishing of classrooms, increased supply of trained teachers, continuous professional support, increased supply of instructional materials, upgraded school management capacity, regular in-service training of all teachers, relevant curriculum, examination and assessment systems. Teachers are able to effectively interact with and impart knowledge to pupils.

Pupil participation

Evidence from studies confirms that the results so far achieved in enhancing effective pupil participation at school are satisfactory. The pupils now look at school as a place where one studies to be able to get a job and become an effective member of society.

Community participation

In the community, quality changes have been observed through positive attitudes of parents and pupils towards basic education. The communities' valuation of basic education has improved and they have become more supportive and interested in internal schooling processes. This has helped to check cases of juvenile indiscipline, immorality, hooliganism, and drop-outs. This improvement in community commitment is reflected in the better facilitation they now extend to their children in the form of exercise books, pens, pencils, uniforms and meals.

Cases of indiscipline, immorality and hooliganism in villages surrounding the school have reduced. The rate of children loitering around the street has gone down. Pupils are also reported to be cleaner and smarter in uniform since most parents are now prepared to provide them.

Instructional materials

The quality of instructional materials has improved, due to the introduction of competitive bidding during the procurement process.

Their relevance has been ensured through local authorship, which takes into consideration national and local needs, gender and cultural aspects.

Curriculum, national examinations and assessment

The national curriculum committees have been established to monitor validity for each examined subject. The number of examination questions testing higher order cognitive skills of pupils has been increased. Also, the introduction of continuous assessment has ensured the teaching of subjects other than those traditionally examined. In addition, feedback on pupil performance in national examinations is being provided to teachers. Additional initiatives undertaken in the area of national examinations and assessment have created systems of formal information exchange between the key stakeholders involved in quality assurance of national examinations and assessment methods: PTCs, NCDC and UNEB. The qualities of all these aspects of examination are monitored effectively by NAPE.

The Primary Teachers Education curriculum for Grade III teachers has been revised, made relevant and adjusted to meet the changing needs of primary education curriculum and examinations. The course content has been enhanced to address current teaching demands and students graduating from the program (pre-service and in-service) have been imparted with skills tailored to effective delivery of quality education to pupils.

The language of instruction for lower classes (P1-P4) has been changed from English to mother tongue; as a result, pupils are now able to contribute and participate in class more effectively. This change has further increased the pupils' confidence and enabled them to understand concepts faster than before.

With the introduction of UPE, the quality of P7 completers has improved. Since the implementation of the new curriculum, pupils that completed P7 have acquired a wider range of knowledge and skills. This is because the reviewed primary school curriculum contains

subjects that involve more practical and productive skillsets. Before the curriculum was reviewed, the pupils that completed P7 were not as productive since the knowledge acquired was aimed at passing examinations and not equipping pupils with basic life skills.

5. Costs and sustainability of the reforms

Introduction

In this chapter we examine the costs that have been incurred in the implementation of the reforms under the PERP pillars: increasing access to quality learning, improving school management and instructional materials, and strengthening planning, management and implementation.

For purposes of uniformity in analysis, ADEA provided a model for identifying costs and sources of funding for both investment and recurrent expenditure. It also includes estimation of costs incurred on annual basis and the number of beneficiary students. Although the model talks of computation of recurrent costs on annual basis, this paper picks the recurrent costs from the Medium Term Budget Framework and the PETDP cost summary sheet.

The costs in each of the pillars are looked at in two perspectives: costs that were incurred at the investment level and recurrent costs. In order to identify investment costs, we note the investment costs incurred under PETDP over the period 1992/93 to 1997/98, as specified in the 1993 World Bank Staff Appraisal Report. An attempt is made to show which funds are donor-provided and which are provided locally. Computation is made for the annual recurrent cost per student based on the UPE capitation grant releases and enrolments of UPE pupils.

Costs incurred under PETDP

For each of the pillars under PERP, the costs incurred under PETDP are summarized in *Tables 5.1, 5.2, 5.3 and 5.4*. *Table 5.1* shows PETDP cost summary in US dollars invested in 1993. It indicates costs incurred by foreign agencies and government.

Table 5.1. PETDP project cost summary in US \$ (thousands)

Pillar	Component	US\$		
		Local	Foreign	Total
1	Improving prim. management & instruction	1,879.7	1,796.6	3,676.3
	Rehabilitation & constructing facilities	5,851.2	18,022.6	23,873.8
2	Providing learning materials	1,156.4	10,932.2	12,088.6
	Revitalizing private sector printing & publishing	213.9	412.6	626.5
3	Strengthening planning & policy analysis	1,274.9	1,197.4	2,472.3
	Upgrading management systems	1,414.3	1,092.3	2,506.6
	Reforming curriculum & examination	605.3	3,323.0	3,928.3
	Project implementation unit	825.9	2,200.7	3,026.6
Total baseline costs		13,221.7	38,977.4	52,199.0
Physical contingencies		664.7	1,948.9	2,613.6
Price contingencies		5,911.4	3,405.5	9,316.9
Total Project costs		19,797.8	44,331.8	64,129.5

Source: World Bank staff appraisal report (1993)

The actual total project cost was \$104.1 million, including two \$25 million grants from USAID to Uganda for the establishment of the TDMS and provision of instructional materials respectively. *Table 5.1* indicates a total project cost of \$64.1 million, including \$10 million from the \$25 million book grant and excluding grants for TDMS establishment. In addition to that IDA funded the establishment of TDMS (\$4.8 million) and provision of learning resources (\$3.8 million). The government of Uganda relied heavily on donor support to provide the initial investment funds, because the economy at that time was in shambles and there were inadequate funds generated through taxation. The contribution of the government was \$19,797.8 as opposed to \$44,331.8 from donors (see *Table 5.1*).

The investment costs were \$48,024.2, of which \$10,206.5 were local investments, while foreign funds summed up to \$37,817.7. Total recurrent costs were \$4,174.8, with \$3,015.1 locally provided funds and \$1,159.7 from donors. Total contingencies (physical and price) added up to \$11,930.5.

Costs incurred under each pillar annually for the period 1992/93 to 1997/98 are as indicated in *Table 5.2* below. These comprise of both investment costs and recurrent costs (including both physical and price contingencies).

Table 5.2. Annual costs (including contingencies) incurred under each pillar between 1992/93 and 1997/98 (in thousand US \$)

Pillar	Component	92/93	93/94	94/95	95/96	96/97	97/98	Total
1	Improving primary management & instruction	692.2	1,301.5	1,026.0	974.8	676.4	129.1	4,800.0
	Rehabilitation & constructing facilities	271.0	3,879.1	4,869.9	6,868.4	7,123.2	7,388.1	30,399.8
								35,199.8
2	Providing learning materials	0.0	11,564.0	2185.6	0.0	0.0	0.0	13,749.9
	Revitalizing private sector printing & publishing	460.6	72.7	70.8	70.7	72.4	0.0	747.3
								14,497.2
3	Strengthening planning & policy analysis	1,292.4	782.4	528.6	213.1	165.2	55.6	3,037.4
	Upgrading management systems	921.6	604.8	563.2	373.8	391.3	409.6	3,264.2
	Reforming curriculum & examination	608.1	1,609.9	1,493.9	567.5	187.3	118.1	4,584.8
	Project implementation unit	1,377.2	571.4	806.9	521.3	137.9	131.7	3,546.4
								14,432.8
Total projects costs		5,623.1	20,385.8	11,545.0	9,589.6	8,753.8	8,232.2	64,129.5

Source: World Bank staff appraisal report (1993)

About half of the project costs (\$35,199.8) were incurred on increasing access to quality learning. A total of \$14,497.2 were invested in improving quality of instruction and US \$14,432.8 on strengthening planning, management and implementation. Of the above total project costs, about 90% were investment costs and 10% recurrent costs. This is as seen in *Table 5.3* below.

Table 5.3. Annual investment and recurrent costs (including contingencies) incurred over the period 1992/93–1997/1998 (in thousand US \$)

	92/93	93/94	94/95	95/96	96/97	97/98	Total
Investment costs	5,304.1	19,248.5	10,325.7	8,319.5	7,516.5	7,558.1	58,272.4
Recurrent costs	319.1	1,137.4	1,219.4	1,270.0	1,237.2	674.1	5,387.1
Total costs	5,623.2	20,385.9	11,545.0	9,589.5	8,753.7	8,232.3	64,129.5

Source: World Bank staff appraisal report.

The investment costs indicated in *Table 5.3* include costs on civil works (construction and renovation), equipment (furniture, vehicles, instructional materials and other equipment and materials), training (local and international), and costs on technical assistance (local and foreign assistance). Recurrent costs constitute of salaries, consumables, maintenance, travel and per diem.

Table 5.4. Total investment and recurrent costs under each pillar (including physical and price contingencies) (in thousand US \$)

Component	Investment costs	Recurrent costs	Physical contingencies	Price contingencies	Total
Improving primary management and instructional quality	1,477.5	2,198.7	183.8	939.9	4,799.9
Rehabilitation & construction facilities	23,262.0	611.9	1,193.7	5,332.2	30,399.8
Providing learning materials	12,088.6	0	604.4	1,056.6	1,3749.6
Revitalizing private sector printing & publishing	574.0	52.5	31.3	89.5	747.3
Strengthening planning & policy analysis	2196.8	275.6	127.2	437.8	3,037.4
Upgrading management systems	2,197.6	309	125.3	632.2	3,264.1
Reforming curriculum & examination	3,680.9	247.2	196.4	460.1	4,584.6
Project implementation unit	2,546.6	480	151.3	368.5	3,546.4
Total	48,024.0	4,174.9	2,613.4	9,316.8	64,129.1

Source: World Bank staff appraisal report.

Meeting the cost of Core-PTCs has been achieved through the continuous commitment of the stakeholders to funding TDMS activities. Since the inception of TDMS, huge amounts have been spent on the entire 23 Core-PTCs, although most PTCs in the first three phases benefited more from the program than those in subsequent phases. This was a deliberate design aspect meant to cater to differences in regional demand for training teachers, coupled with government's confidence to invest in sites that were publicly owned.

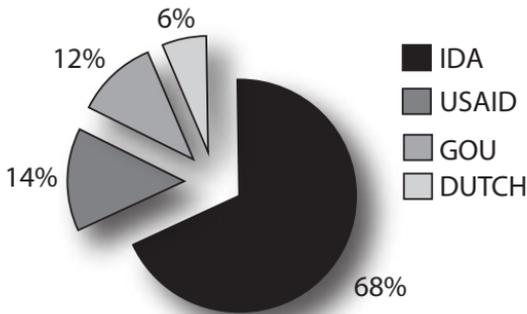
Since 1999, TDMS recurrent budget activities have been integrated in the MTBF.

Table 5.5. Total TDMS expenditure for core PTCs in phases I-V (1994/5–1999/2000)

F/Ys	IDA	USAID	DUTCH	GOU	Total
1994/95 1999/00	53,748,004,545	11,240,317,900	4,839,261,653	9,314,894,089	79,142,478,187

Source: Summative evaluation report on TDMS 2000 (figures in Uganda Shillings)

Figure 5.1. Expenditure on Core-PTCs



Costs incurred under MTBF and other sources

As previously mentioned, PERP has been incorporated in the MTBF. This is very significant because it indicates government’s total commitment to sustaining the reform. Although government will continue to benefit from external funding to run some activities of the reform, gains from the reform itself will not be threatened by a cessation of external funding. Any decline in external funding will only affect the scale of operation.

Costs for increasing access to quality learning

In addition to the expenditure under PETDP, government has continued to make provisions for the UPE Capitation Grant, the Schools Facilities Grant, teacher salaries and TDMS financing in the recurrent budget.

Ever since the declaration of UPE in Uganda, allocations have been made to finance it through the normal budgetary process. The financial resources that have been devoted to the implementation of UPE have risen from 20.6 billion Uganda shillings when the program commenced in 1997 to over 41.53 billion to date. It represents a percentage increase in funding of 102% in nominal terms over a six-year period. In order to improve infrastructure in primary schools (classrooms, sanitary facilities and teachers houses), government made provisions for the SFG in the recurrent budget as shown in *Table 5.6*. The table shows that the releases of SFG have increased progressively over the years. Running side by side with funding for UPE Capitation Grant and SFG are costs incurred on teacher recruitment and deployment. Therefore, not only has there been a concerted effort to finance access to primary education, but there is also a real attempt to improve facilities and the quality of teaching, this through the provision of adequate teachers. *Table 5.6* indicates an increase in expenditure on teachers' salaries.

Table 5.6. Recurrent expenditure on capitation grant, new facilities and teacher wage bill under the MTBF

Year	Actual UPE releases	SFG	Total teacher wage bill
1996/1997	20.60	0	
1997/1998	26.20	0	
1998/1999	31.66	4.132	100.00
1999/2000	38.40	28.053	99.73
2000/2001	38.56	45.912	121.02
2001/2002	41.83	55.900	168.69
2002/2003	41.53	53.883	185.07
Total	238.78	187.88	674.51

Source: MTBF spreadsheet (figures in billions Uganda shillings)

Recurrent cost per student

The annual recurrent cost per student has fluctuated over the years. The calculated annual recurrent cost per student is 5647.1 shillings for 2002 (see *Table 5.7*), while the average amount set by government is 6550 shillings (5000 shillings for pupils in P1-P3 and 8100 shillings for pupils in P4-P7).

Table 5.7. Annual recurrent costs per student

Year	1996	1997	1998	1999	2000	2001	2002
UPE capitation grant	20.60	26.20	31.66	38.40	38.56	41.83	41.53
Beneficiary pupils	3,068,625	5,303,564	5,806,385	6,288,239	6,559,013	6,900,916	7,354,153
Annual recurrent cost per student	6713.1	4940.1	5452.6	6106.6	5878.9	6061.5	5647.1

In conclusion, it can be seen that expenditure on UPE capitation, SFG releases and recruitment of teachers have been proportionately increasing. Below is a summative *Table 5.8* showing expenditure on activities for improving quality of learning.

Table 5.8. Recurrent expenditure on increasing access to quality learning

Aim	Activities	1998/99	1999/00	2000/01	2001/02	Total
Improve teacher training	Pre-service training Non Wage	4.95	5.89	3.50	7.77	22.11
	Pre-service training wage	4.39	4.80	4.37	4.86	18.42
	In-service training non wage	0.66	2.50	4.70	5.26	13.12
	In-service training wage	0.00	1.05	1.80	2.17	5.02
Improve book ratio	Recurrent Instructional materials (Replacement)	4.32	3.78	11.03	0.00	19.13
Ensure PLE completion	PLE fees	0	1.5	2.072	1.081	4.653
Reduce pupil Classroom ratio	Construct classrooms	18.63	33.97	48.30	53.54	154.44
Extend In-service teacher Development	TDMS Phases I, II, III,	12.094	0	0	0	12.094
	TDMS Phases IV and V	0	11.71	9.062	6.638	27.41

Source: Education MTBF spreadsheet (figures in billions Uganda shillings)

Costs incurred in improving instructional quality

A total of 45.246 billion Ugandan shillings have been spent on the provision of learning materials to government-aided primary schools. *Table 5.9* shows the summary of annual budgetary allocation in MTBF.

Table 5.9. Summary cost of provision of learning materials under MTBF

Year	1998/99	1999/00	2000/01	2001/02	Total
Amount (Billion UgShs)	9.88	10.5	9.206	15.66	45.246

Source: Summary education medium term budget framework 1998/99-2003/04

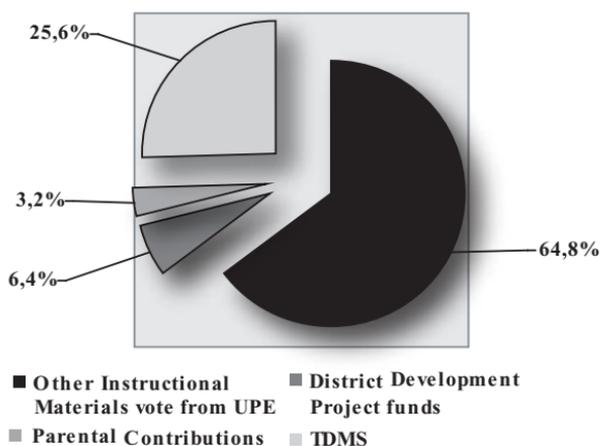
Districts, through their development projects and parents, communities and individuals and other education programs (TDMS) have also contributed towards supporting the purchase of learning materials. The breakdown of these contributions is summarized in the *Table 5.10* below.

Table 5.10. Other contributions towards learning materials by source

Source of funds	Amount in million US\$
Other instructional materials vote from UPE	3.04
District development project funds	0.30
Parental contributions	0.15
TDMS	1.198
Total	4.688

Source: MOES

Figure 5.2. Contribution towards learning resources



Costs for the strengthening planning, management and implementation

In order to support the strengthening of planning, management and implementation, government has continued to provide funds in its budget process over the years, as shown in *Table 5.11* below.

Table 5.11. Various expenditure categories to support strengthening, planning and implementation

Expenditure item	1998/99	1999/00	2000/01	2001/02	2002/03	Total
EMIS	0	0	0.309	0.936	0.902	2.147
Develop ESIP process	0	0.290	0.381	0.484	0.525	1.680
District capacity building	0	0.040	1.800	5.078	2.961	9.879
Central capacity building	0	1.980	1.595	0.990	1.595	6.160
EPD-Recurrent expenditure	0.511	0.110	0.125	0.144	0.195	1.085
Support PAF monitoring	0	0	0.465	0.405	0.500	1.370

Source: MTBF spreadsheet (figures in billions Uganda shillings)

There have also been provisions for PAF funds: these are allocated in the budget for the specific areas and not subjected to budget cuts. *Table 5.12* shows the budget releases for 2001/02 and 2002/03 and the projections from 03/04 to 05/06.

Table 5.12. Poverty action fund expenditures in 2001/02–2005/06 (Uganda shillings billions)

	2001/02 Budget Releases	2002/03 Budget Releases	2003/04 Budget Projections	2004/05 Budget Projections	2005/06 Budget Projections
• Primary education conditional grant	41.83	41.53	41.53	42.95	47.90
• Primary education district Development grants	53.54	53.88	51.59	52.84	58.02
• Primary education ministerial recurrent budget	-	4.02	4.02	4.02	5.01
• Primary education Ministerial development budget	31.69	30.05	29.81	31.32	31.57
• Primary education teachers wages	168.69	185.07	196.58	205.98	215.98
TOTAL	296.62	314.56	323.54	337.11	358.47

Source: MTBF spreadsheet 03/04 – 05/06

Sustainability of primary education on long-term basis

Due to the state of the economy at the inception of PERP, donors provided the initial investment for PERP at that moment in time. They also continued to fund that investment from 1992/93 to 1997/98, since the government was pursuing policies that had been agreed upon (putting emphasis on primary education). The government now provides the recurrent costs on primary education in the MTBF. The donor community also supports the MTBF through budget support thus ensuring sustainability of the programs.

The government of Uganda, together with its donor partners, has continued to put great emphasis on the development of the social sector. Priority in allocation of budgetary resources is given to basic education. In the 94/95 fiscal year for instance, 19.8% of the total government recurrent budget was devoted to education sector. However, this figure dramatically rose to 31%, with 65.6% and 69.4% of the total education sector budget being devoted to primary education in 1998/99 and 2001/02 respectively. (See *Annex 2* and *Table 5.13*) Thus it can be seen that, due to the importance government attaches to primary education, the provision of quality basic education is sustainable.

Table 5.13. Education sub-sector expenditure for the period 1998/9 to 2001/2

Education sub-sectors	1998/9	1999/0	2000/1	2001/2
Primary	65.6	68.5	71.5	69.4
Secondary	15.5	12.8	13.2	14.2
BTVET	4.0	4.1	3.0	4.0
Tertiary	10.3	10.8	9.0	9.0
Others	4.6	3.8	3.3	3.4
Total	100.0	100.0	100.0	100.0

Source: MTBF spreadsheet

Conclusion

At the inception of the reform, government relied heavily on external support. This was inevitable, given the fact that the economy had collapsed. External assistance was therefore necessary for investment purposes in areas that were critical to the recovery of the education sector in general and the basic education sub-sector in particular.

However, the economy has significantly recovered, and with it government's ability to meet the recurrent costs of the reform. The increasing support of the community to education activities offers even higher prospects of continuous support of the reform at the local level. Local governments can now raise public revenue to support education activities, and this has been further strengthened by increased involvement of public sector investment in education.

The fact that investment costs have reduced tremendously implies that government's main concern now is meeting the recurrent costs of the reform. These do not pose a big threat: through PAF, government has instituted financial instruments, which protect investments in basic from budget cuts.

Finally discovery of new mineral resources (particularly oil in the Lake Albert area) and unexploited tourist potential gives a lot of optimism for the sustainability of the education reform in the country.

6. Lessons learnt: challenges, constraints and opportunities

Lessons learnt

Any educational reform is invariably intertwined with the realities of the political, economic and social environment in which it is taking place. The interplay between political power, economic wealth and social status of the people frequently exerts considerable influence on the direction, pace and nature of the reform process. As a result, the reform's final outcomes only become meaningful when judged from a context-specific perspective. However, Uganda's experience with PERP offers several broad lessons that could be of universal applicability, in particular to developing nations.

- **National ownership of the reform:** PERP is a homegrown reform planned and executed by Ugandans themselves, and it relies heavily on local expertise. As a result there is a strong sense of national ownership for it. It has become a rallying point for national development because of its potential for addressing national key development challenges (rapid population growth, poverty, health).
- **The need for a critical minimum package of enabling factors which serve as pre-conditions for reasonable success of a reform process.** These include:
 - *Political will and commitment* to upgrade the socio-economic status of the populace. For instance, with the exception of a few areas of the country, the government has succeeded in restoring security of persons and property of the majority of Ugandans. It has also mounted programs to tackle household poverty and to structurally transform the Ugandan society from its pre-industrial state into a modern self-sustaining economy. This has created an environment conducive to the development of all sectors of the economy including education.

- *Adequate community-based support* that is essential in ensuring sustainability of any reform. It is the government, with its belief in participatory methods of work that has systematized community involvement in education activities. This has in turn created resilience in the system to unforeseen shocks and enhanced accountability and transparency in the sector.
- *Creation of new partnerships* and a redefinition of their roles to enhance respect for each other's views and collegiality. The "open door" policy of the current government has helped to diversify sources of funds for the education sector. It has also encouraged stakeholders to play an increasingly important role in the running of the education system. Above all, the double coincidence of government's economic liberalization policy on one hand and the global movement for basic education for all on the other, has guaranteed increased external resource inflows into the basic education sub-sector.
- *Good, transparent, accountable and participatory governance*. The current government has created a local council system of governance, which encourages grassroots participation in decision-making. These councils have wide-ranging mandates that include planning, resource mobilization, implementation, and monitoring and evaluation.
- *The adoption of the new Constitution in 1995* has provided further impetus for the development of basic education in the country. The new constitution recognizes basic education as a right for all citizens and makes it obligatory for the state to provide for it. It contains provisions for democratic governance, gender mainstreaming, involvement of civil society organizations in civic affairs, public accountability institutions and decentralized service provision. All these have enhanced ownership, transparency and accountability and contributed to effective use of available resources for education.
- *The good will from the donor community* which has guaranteed regular funding of education activities.
- **The need to locate educational reform firmly in the daily realities of the local communities.** This should be done throughout

the process of educational renewal and development. For example, the CCTs are an effective link between the grassroots on one hand and professional educators and the provider organizations on the other. This together with the decentralized model of basic education service delivery allows for optimal exploitation of synergies between the different components of PERP.

- **Consistence in pursuance of policy priorities.** Throughout the reform period, government has consistently pursued policy objectives that favor social empowerment through involvement of the majority in national development. Basic education is therefore seen as an instrument for facilitating rapid social transformation.
- **Readiness of the population to embrace new ideas and innovations.** Uganda has had a long history of quick adaptability to new ideas and innovations, which has made the implementation of PERP a lot easier.

Furthermore, for an educational reform to succeed, it is incumbent upon government and other provider organizations to develop structures, systems and institutions with a holistic outlook and relevant capacities. Carefully diagnosing the potential and constraints of the planned education reforms, formulating their concrete goals and plans, creating appropriate institutional structures for implementing the reforms, effectively managing the reform process and ensuring meaningful participation of all beneficiary groups in all activities are essential pre-conditions for success. These are the issues highlighted in the EPRC report of 1989 and which guided the implementation of PERP.

Challenges

Although the implementation of PERP has been instrumental in transforming the education sector in general and basic education in particular, there are still challenges that need to be overcome to make the gains from the program more sustainable. Core issues of widespread poverty, HIV/AIDS, inadequate and inequitable financial resources, conflict, social exclusion, gender disparities and

rapid population growth need to be tackled. Also the issue of lack of appropriate technology with substantial multiplier effect to basic education needs to be addressed.

Uganda is ranked among the poorest countries in the world, with the per capita income of US \$370 (2002). About 35% of the total population is estimated to be living below the poverty line and the generally low socio-economic status of many families continues to impact negatively on the participation of their children in educational activities. Most of the families cannot afford basic scholastic materials like uniforms, or pens and pencils for their children. As a result, most of these children are a major source of labor to supplement household income. This has contributed to high rates of absenteeism, poor performance and school drop-out.

The prevalence of HIV/AIDS has affected the most productive strata of the Ugandan population, posing a major threat to human resource development. For instance, it has disrupted and eroded the traditional safety nets through death of parents and other family members, leading to an increasing phenomenon of total orphans. Also, the prolonged nature of illness and eventual death of those affected exacerbates poverty. Consequently, children have been forced to assume the headship of the households, are being cared for by distant relatives/neighbors or have taken refuge in the streets. Low school attendance and high attrition levels among the teaching force threaten to undermine efforts to improve the quality of education.

The primary education sector has not yet recovered from the anticipated shocks of UPE, and it continues to operate in an emergency setting, as it is highly dependent on external budget support. The provision of capitation grants under UPE is not adequate to effectively meet the dire requirements of schools. This, coupled with weakness of the domestic economy, makes the future of basic education in Uganda less optimistic.

Wars and conflicts continue to disable the education sector through the destruction of school infrastructure and equipment, disruption of the supply of several educational inputs and abduction of children.

This has resulted into low school attendance, increasing the vulnerability of girls, destruction of the economic base of the affected communities, abductions of children, trauma and overall decline in the quality of human lives.

Uganda's population growth rate, which is currently at 3.4% per annum, is one of the highest in the world. Such a high growth rate implies a high population of primary school age (6–12 years) children. In Uganda, this is estimated at 19% of the total population. A large population of children has contributed to a high dependency ratio of 124:7. This combination of rapid population growth and a high dependency ratio have magnified the challenge of achieving quality UPE in Uganda.

Social exclusion undermines the goal of achieving expanded access to education for some sections of the population. Children may be disadvantaged by their class or caste, or because they belong to an ethnic, linguistic, cultural or religious minority. In Uganda, migrant families and nomadic communities face specific difficulties, since they often do not benefit from the formal education system. The choice of language for initial instruction may privilege majority tribal groups and disempower the minority ones.

There is still inferior valuation of education among some marginalized populations, especially in Karamoja, Kalangala and other fishing and nomadic communities. Uganda has been able to offset some of the challenges and constraints by putting in place a dependable macro-economic policy framework, laying a foundation for good governance, aggressively pursuing HIV/AIDS awareness campaigns, mounting advocacy programs for girls' education and marshalling community support.

Opportunities

Despite all these challenges, Uganda can be said to be at the threshold of a new era with promising opportunities, possibilities and potentialities. There is now genuine progress towards peaceful détente within the country, poverty reduction, and greater coopera-

tion among the various ethnic groups. Essential rights and capacities of women, children and other previously marginalized groups are being recognized. These together with the rapid increase in the quantity of information relevant to the people's basic survival and well-being can have a synergistic effect on future initiatives geared towards revamping basic education. The interface between these new developments with the cumulative experience that Uganda now has with regard to basic educational reform, innovation and research makes the goal of education for all attainable.

Concerning the long-term goal of providing education for all, there is still a lot of spare capacity in the primary education sub-sector and an unexploited economic potential in Uganda. For example, some primary schools are still under-enrolled; there are many qualified teachers who are not employed; private investors are increasingly becoming attracted to the education sector, and community support is forthcoming. In addition, the on-going mineral prospecting in the Karamoja and Lake Albert areas has revealed the existence of significant quantities of gold and oil reserves: this could enormously improve the foreign exchange earning opportunities of the country.

7. Conclusion

It can be deduced from the foregoing documentation of the impact of PERP on the quality of basic education in Uganda that:

- There is an expanded access to basic educational opportunities for all the client groups in direct response to increases in the provision of both human and material resources.
- The creation of new partnership was accompanied by a change in the nature of the relationship between the key stakeholders in education, especially between the aid-receiving country and its donors, i.e., there was a shift from the donor recipient pattern of the past to a more genuine partnership.
- The primary school curriculum is more tailored to the local labor market realities than it was previously.
- There is substantial reduction in gender disparities in primary school enrolments, survival rates and pass rates.
- Educational planning, management and implementation capacities have been renewed and broadened.
- Both teaching and learning practices at the primary school level have been upgraded.

The preceding discussion of the program activities, achievements, challenges and constraints has revealed that through the ten years of the reform (1993–2003), a lot of quality changes in basic education have taken place. These changes include improved capacity in planning and management, improved teaching and learning environment, and increased participation of stakeholders in the provision of basic education.

The quality of these changes has been assessed in terms of inputs, processes, outputs and outcomes. The inputs include instructional materials, classrooms, reviewed curriculum, qualified teachers and good education managers. The processes include the methods and utilization of the inputs in the course of teaching and learning. The outputs and outcomes include improved education management,

improved teaching and learning, improved quality of P7 leavers and positive attitude change of the community towards basic education.

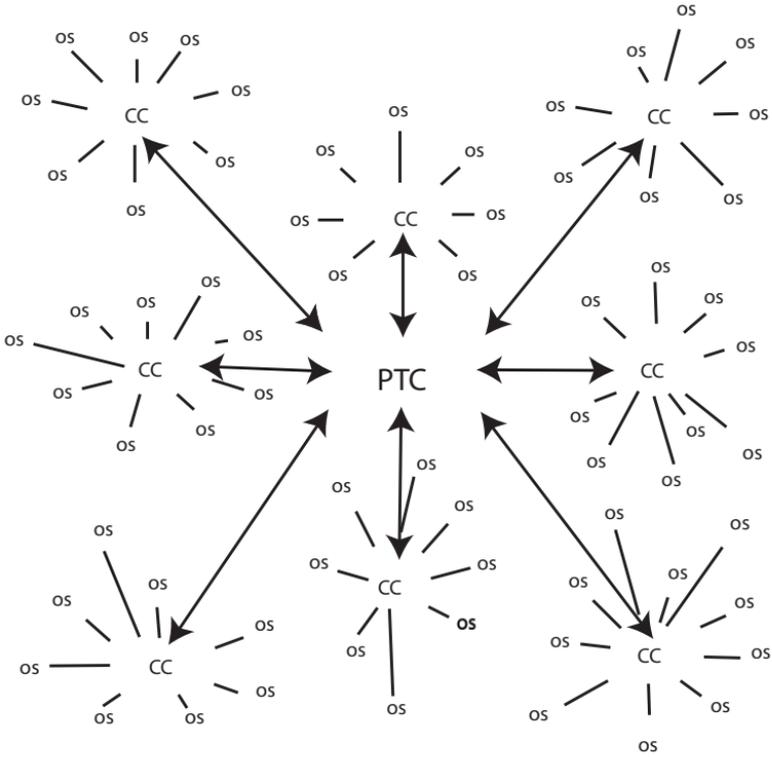
The successes scored in implementing PERP are attributed to a combination of factors. These include the enabling political climate, accelerated economic growth, elaborate legal framework, correct prioritization and commitment and support from all key stakeholders.

The positive quality changes resulting from Uganda's PERP, especially in the form of improvements in the quality of human resources, material resources, teaching practices and results are indicative of the correctness of the basic education reform path Uganda has opted for.

The sustainability of the improvements registered will depend on how the government deals with the challenges, which have persisted during the implementation of PERP. The major ones are insecurity in the northern region of the country, the prevalence of HIV/AIDS, decreasing compliance rates in payment of graduated taxes, and high poverty levels in the rural communities.

8. Appendices

Appendix 1



Legend
PTC- Primary Teacher Colleges
CC - Coordinating Center
OS - Outreach School

Appendix 2: Sectoral shares of public expenditure excluding donor projects, arrears and promissory notes and contingencies

Sector Shares	1994/95 Outturn	1995/ 96 Out- turn	1996/ 97 Out- turn	1997/98 Budget Estimates	1997/ 98 Out- turn	1998/99 Budget Estimates	1998/99 Revised Outturn	1999/00 Budget Estimates	1999/00 Revised Outturn
Roads and Works	4.4	4.3	6.8	6.0	4.9	7.8	6.2	8.3	8.1
Agriculture	2.6	1.5	1.4	1.4	1.1	1.6	1.0	1.4	1.5
Education	19.8	18.8	22.0	25.0	26.0	25.3	26.9	26.9	26.1
Health	8.0	9.9	7.2	7.3	6.6	7.4	6.7	6.5	6.6
Security (Defense, ISO/ESO Pensions)	19.6	18.8	18.4	14.4	14.8	16.7	19.8	15.3	15.4
Water				0.7	0.5	1.3	1.2	1.4	1.5
Law and Order	8.9	9.7	8.7	8.7	8.9	7.8	7.2	6.9	7.3
Accountability				0.5	0.5	0.6	0.6	0.6	0.8
Economic Functions, Social Services & Multisectoral	8.7	6.1	6.4	4.1	4.1	3.1	2.7	6.3	4.6
Public Administration	20.1	22.3	22.0	22.6	24.9	20.0	20.7	19.3	20.3
Interest Payments Due	8.0	8.6	7.0	9.3	7.6	8.4	7.0	7.1	7.7
All Sectors	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Sectoral projections

Sector Shares	2000/01 Draft Estimates	2001/02 Projected	2002/03 Projected	2003/04 Projected
Roads and Works	9.2	8.9	7.7	7.5
Agriculture	1.6	2.5	2.3	2.2
Education	26.8	24.1	24.6	24.9
Health	7.7	8.9	10.2	10.5
Security (Defense, ISO/ESO, Pensions)	13.9	11.9	12.5	12.9
Water				
Law and Order	2.4	2.8	2.6	2.5
Accountability	6.3	6.7	6.6	6.5
Economic Functions, Social	1.1	1.2	1.2	1.2
Services & Multisectoral	6.3	7.4	8.4	8.3
Public Administration	17.6	17.4	16.4	16.0
Interest Payments Due	7.1	8.1	7.4	7.4
All Sectors	100.0	100.0	100.0	100.0

Source: PEAP document Vol. 3

Note: Until 1997/98 water was not considered a separate sector.

Appendix 3: Synopsis of TDMS program implementation

Component	Implementation strategies	Main Activities	Implementation arrangements		
			Level	Key actors	Roles
1. Training (in-service, pre-service, management training for education managers, outreach tutor training, training VCMs)	<ul style="list-style-type: none"> - Distance education during term time - Short face-to-face residential training during holidays - Workshops - Peer group meetings - Study tours 	<ul style="list-style-type: none"> - Monitoring & evaluation - Release & release of funds - Receive accountability - Production of instructional materials - Informal sharing of experiences - Structured in-service courses 	National	EPD	Resource mobilization
				Teacher Education Dept.	Approve training Administrative guidance
				Inspectorate	Improve quality in PTCs Organize training & approve PTC courses
			District (Host)	DEO	Supervises activities of PTCs
				DIS	Supervise CCTs and school activities
			Core-PTC	Director Core-PTC	Manage Core-PTC Manage finances Support primary education activities
				Deputy Principal Outreach Department	Coordinate outreach activities with help of heads of programs
				Heads of program	Coordinate management, in-service training and refresher courses
			Coordinating Center	Coordinating Center Tutor	Supervise outreach schools and teachers Gather teachers from outreach schools Provide a framework for efficient and effective school practice
			2. PTE Curriculum Review	<ul style="list-style-type: none"> - Establishment of a curriculum review task force - Setting up of subject panels 	<ul style="list-style-type: none"> - Consultation with stakeholders on what to integrate - Development of course books for PTCs - Designing modules - Establishment of subject panels
Core-PTC	Head of in-service teacher education	Supervise the curriculum and instruction in schools			

3. Instructional Material Supply	<ul style="list-style-type: none"> - Establishment of IMU - Centralized bulk procurement - Centralized allocation to districts - District-based distribution to schools - School-based management of use of instructional materials 	<ul style="list-style-type: none"> - Distribution of instructional materials to districts - Distribution and delivery beneficiary schools - Monitoring and evaluation - Monitor utilization at the school - Train teachers in instructional material handling 	National	IMU	<ul style="list-style-type: none"> - Consolidation of district orders - Ware housing - Breaking of bulk according to districts - Managing procurement process
			District	Instructional materials desk	<ul style="list-style-type: none"> - Transportation of IM from the center - Temporary storage - Notification of schools - Report at the center - Gather school preferences for instructional material
			School	Head teachers	<ul style="list-style-type: none"> - Indicate their preferences for instructional materials to the district - Report to the district - Management of use of IM
4. Infrastructure provision and supply of equipment	<ul style="list-style-type: none"> - Construction of new PTCs in phase I & II. Expansion/ rehabilitation of existing facilities in phase III-VI - Centralized procurement and equipment of infrastructure at both CCs and PTCs - Centralized Procurement of building contracts of Core-PTCs - Decentralized procurement & distribution of materials 	<ul style="list-style-type: none"> - Monitoring and Evaluation - Financial management - Procurement and distribution of materials - Supervise and approve all construction work 	National	TDMS unit /PIU	<ul style="list-style-type: none"> - Evaluate contracts and procure contractors
			District	Area planning committee	<ul style="list-style-type: none"> - Direct and support construction work - Payment to contractors - Design architectural works

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Policy dialogue takes place within programs and activities carried out by the ADEA Secretariat and the Working Groups. The Biennial Meetings organized by ADEA are events of the greatest importance for education in Africa. African ministerial conferences and ADEA Steering Committee seminars are also auspicious occasions for promoting regional policy dialogue and exchanges concerning the agenda for educational cooperation on the continent.

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Finally, ADEA has a publications program which seeks to share the lessons of the Biennial Meetings and to highlight ongoing successful experiences in Africa. The Secretariat also publishes a quarterly Newsletter and a monthly Bulletin of Briefs.

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Impact of Primary Education Reform Programme (PERP) on the Quality of Basic Education in Uganda

The Book

This publication presents the results of a study on the Uganda Primary Education Programme (PERP), which was launched in 1992 to redress declining quality of basic education in the country. Prior to the adoption of this programme, Uganda had experienced nearly two decades of socio-economic mismanagement and civil strife that resulted into the collapse of the economy including the social sector. Consequently, the education sector was severely devastated.

PERP was therefore, designed as a post-conflict socio-economic recovery programme of the National Resistance Movement (NRM) Government that had seven years earlier, which is in 1986, taken the mantle of power in Uganda.

The PERP was a basic education programme designed with three complementary pillars of expanding access to quality learning; improving school management and instructional quality; and strengthening planning and management. As a result of implementing the PERP, wide ranging reforms have occurred across the education system and particularly in the areas of in-service training for primary teachers; expanded access to basic education; instructional materials provision to primary schools; Education Management Information System; curriculum and examinations; aid-coordination in the education sector; and planning and budgeting.

The study highlights the design of PERP, its objectives, implementation strategies, the implementation process; results obtained and factors that underpinned its and implementation. Furthermore, it outlines initiatives that have resulted from the implementation of PERP, the main ones being: The Teacher Development and Management System (TDMS); Universal Primary Education (UPE); Education Management Information System (EMIS); the Medium Term Budget Framework (MTBF) and the Sector-Wide Approach (SWAp) in the education sector.

The PERP study was undertaken within the framework of ADEA's programme of improving the quality of basic education in Sub-Saharan Africa.

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