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CARIBBEAN DEVELOPMENT BANK



EVALUATION REPORT

**REVIEW OF THE CARIBBEAN DEVELOPMENT BANK'S
EDUCATION AND TRAINING POLICY AND STRATEGY
WITH MANAGEMENT RESPONSE (APPENDIX 1)**

FINAL REPORT

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Final Report

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Serena Rossignoli
Head (Ag.), Office of Independent Evaluation

Executive Summary

The Caribbean Development Bank (CDB) has a long history of engagement in the education and training sector, which is one of the Bank's core areas of work. The current guiding framework for CDB's work in the sector is the 2017 Education and Training Policy and Strategy (ETPS). The overall goal of the 2017 ETPS is to improve the quality of education in Borrowing Member Countries (BMCs), leading to increased learner outcomes producing a qualified, capable and representative workforce of diverse individuals, to reduce poverty and achieve inclusive social and economic development for the Region.

This review was commissioned by CDB's Office of Independent Evaluation (OIE) to assess the performance of CDB's work in the education and training sector from 2017 to 2021 and inform an update or renewal of the ETPS by drawing lessons and making recommendations to improve the development effectiveness of the Bank's future strategies and programming. The review was framed primarily as a *formative* exercise to inform strategic questions about CDB's contributions and its current role in the sector. It was conducted by Universal Management Group (Universal Management or UMG) from February 2022 to April 2023.

The intended audience is the CDB Board of Directors, CDB staff and management, the education team in the Social Sector Division (SSD), and CDB BMCs and development partners in the Region.

METHODOLOGY

The overall approach to the review was theory driven. The review team developed a high-level theory of change (TOC) in consultation with CDB stakeholders. The TOC was used to compare the policy's intentions, underlying assumptions, expected results and planned implementation strategies with what actually transpired over the review period, and helped frame the data collection, analysis, and findings of the review.

The review was guided by a review matrix, addressing questions on the performance of the ETPS, including its portfolio of investment projects and technical assistance (TA), and the CDB's non-financial interventions to support the ETPS. The review team used two overall framings to help answer the review questions: i) illustrative cases, which provided an in-depth review of work in certain priority areas of the ETPS; and ii) broad-based review, which encompassed the portfolio review, regional stakeholder consultations, and interviews with all BMCs. The review team put special emphasis on gender and equity dimensions. This was done in a cross-cutting way and was integrated into the questions and indicators in the review matrix, the approach in each of the illustrative cases, the identification of key stakeholders to interview, and the review of secondary data.

The review team primarily used qualitative methods, drawing from secondary data found in documents and portfolio data and generating primary data through individual and group interviews. Interviews and group discussions were conducted with 105 individuals (55 per cent (%) male; 45% female) from CDB, BMCs, regional entities, and development partners. To analyse data, the review team employed qualitative (i.e., descriptive, content, comparative) and quantitative (i.e., descriptive statistics) techniques. Overall, the review sought to improve reliability of information and increase the quality, integrity and credibility of the findings and conclusions through the triangulation of data. To the greatest extent possible, the team based individual findings on several lines of inquiry and data sources. The team faced some limitations, including limited

availability of key stakeholders, staff turnover in BMCs, and limited availability of CDB documentation and adopted different mitigation measures to address them.

FINDINGS

Relevance

The ETPS provided a comprehensive framework aligned with the evolution of priorities in the sector, and allowed CDB to address a range of education needs and priorities of BMCs, albeit with varying depth and breadth. The context of the COVID-19 pandemic increased challenges, changed priorities, and raised the bar in the sector and for CDB, while eroding past gains and progress in many BMCs. In response to COVID-19 challenges, CDB scaled up the importance of education systems in its strategy and made accommodations in individual projects. As part of its COVID response, CDB worked with CARICOM and other regional organizations to produce a regional framework for reopening schools and regional guidelines for the implementation of Caribbean Vocational Qualification (CVQ) in Technical and Vocational Education and Training (TVET) institutions. Overall, the ETPS was aligned with and supportive of other CDB policies, although more at the level of strategy than implementation, and with some inconsistency in terms of integration across the ETPS portfolio, including policy priorities around climate resilience and youth. There were also missed opportunities for greater synergies with other areas of CDB's work, such as with Micro, Small and Medium-sized Enterprises (MSMEs), energy, and agriculture. CDB's support has partially responded to "21st century challenges" in education and training (i.e., equity, equality, and inclusion; digitisation; climate and disaster resilience), but responses are more fragmented than holistic.

Effectiveness and Sustainability

Available results data on the ETPS indicate that CDB made positive differences in some areas of capacity development under each ETPS objective and critical contributions to improved access through building school infrastructure and education facilities. In the area of special education needs, CDB is beginning to foster inclusive access through investment projects, policy dialogue and technical inputs, and research and advocacy; however, these products and services have been insufficient to make a sector-wide difference during the review period.

CDB has improved competencies through providing support to teacher training and curriculum development, while also strengthening wider education sector policy and planning in the region through training of networks and communities of practice, and providing support to regional institutions. For instance, the Let's REAP regional initiative was welcomed by consulted stakeholders to help connect schools and teachers across BMCs, strengthen teacher competencies and school leadership. CDB contributions to the system-wide development of the TVET sector has resulted in an improved institutional framework, stronger TVET institutes and better instructors and programmes. Nevertheless, education systems continue to face numerous critical challenges, and the TVET sector in the region still has numerous unmet development needs. CDB actively collaborates and coordinates with other key actors in the sector, but many sector-wide governance issues, critical for sector reform, have not been fully addressed despite such collaboration. ETPS support to improved M&E and evidence-based decision making made only limited progress and remains a critical priority for BMCs and regional partners. With system-wide needs and challenges, and other programmes active in this area, CDB's role and value-added in M&E capacity change requires further attention moving forward.

Factors Affecting ETPS Performance

CDB performance has been adversely affected by exogenous factors that are common across sectors (i.e., national disasters and emergencies; cyclical political change; and institutional and implementation capacity in BMCs), as well as those specific to the education and training sector (i.e., misaligned timelines between the academic school year and fiscal, project, and contracting cycles; siloed governance structures; and limited access to funding). CDB has made efforts to address factors that hinder ETPS performance, but there remain areas for improvement, in particular in responding to emergencies, developing capacity to generate and use evidence, and greater coordination among stakeholders. CDB's comparative strength in the education sector stems from its familiarity with and presence in the region; its relationships with and ability to convene a broad set of stakeholders; its advisory role and consultative approach that does not come with an "agenda"; and its knowledgeable and well-respected education team. However, the Bank's ability to respond to exogenous factors and perform in the sector is affected by internal capacity constraints around human resources, grant and loan management processes and results tracking. CDB could increase its visibility in the region, especially among stakeholders beyond the government in BMCs.

CONCLUSIONS

As a funder, CDB has made essential contributions to improved school infrastructure, as well as multi-faceted education enhancement programmes in select BMCs. CDB has also been able to leverage additional financial resources for education and training. Alongside its financial contributions to the education sector, CDB has steadily increased its engagement and non-financial support through policy dialogue, coordination, regional initiatives, and other modalities. Indeed, since 2017, CDB has been recognised as a key actor and reference point in the sector due to its non-financial contributions at the regional level and in BMCs.

CDB has enabled positive results in individual BMCs, especially in basic education, TVET, and aspects of sector governance. Results are evident in terms of improved access to early childhood education (ECE), secondary, primary, and tertiary education. In the TVET sector specifically, CDB made notable contributions to improved institutional frameworks and standards, stronger training institutes and better instructors and programmes. CDB has also supported education sector policy and planning at multiple levels (e.g., school, ministry, national, and regional). Despite these positive results, overall investments have not fostered systemic changes of the kind that are required for a more holistic and transformational approach to education in the region. Such systemic changes require a shared definition (or vision) of what 21st century education looks like in the Caribbean. This will require addressing many more aspects of the "strengthened governance" dimension of the ETPS and identifying strategies that can address the underlying assumptions of the changes that are ultimately desired – in a system that is more accessible, equitable, participatory, relevant, and efficient.

CDB's vision of transformative education is ambitious. However, its investment in internal capacity has not been commensurate with that vision and with the expectations that stakeholders have for its role in the region. CDB has made only modest investment in internal staff capacity. This is reflected in the fact that team members wear multiple hats (from technical advisors to project supervisors to partnership managers) and cover many thematic areas requiring breadth and depth of knowledge across education sub-sectors. CDB has also not measured progress toward ETPS objectives and its reporting on results is limited. This has constrained the potential of monitoring and evaluation (M&E) to support accountability, transparency, and learning, and resulted in CDB's contributions and role in the sector not being well known in BMCs beyond ministries of education and among some key regional partners.

RECOMMENDATIONS

The following recommendations outline the key areas that CDB will need to pay attention to, and invest in, to enhance its contributions in the education sector. These recommendations also reinforce recent commitments of the Council for Human and Social Development (COHSOD) of CARICOM to articulate a clear vision for refocusing the education sector following the impact of COVID-19 and to capitalize on the moment to commit to rethinking education and what it should accomplish.¹

Recommendation 1: CDB, led by SSD, should update the ETPS through a consultative process that helps to clarify the Bank's focus areas/key priorities in supporting development of a transformative education system in the Caribbean.

The ETPS provided a comprehensive framework that enabled it to reflect a wide range of BMC priorities and strategically align with regional and global frameworks and the Bank's complementary strategies and policies. A strategy and policy is a living document that can and should be adjusted to reflect the current context. There are a few areas that should be further clarified in the ETPS:

- Definition of transformational change in the sector and what that means in practice.
- Clarity on the nature of the Bank's support for such transformational change, including definitions and strategies for individual learners, the education system, and priority cross-sector linkages.
- Priorities/focus areas for CDB and defining its flagship initiatives for the next five years (what it will be known for). This review suggests that one of these areas can and should be Special Education Needs (SEN) and inclusivity. TVET is another area that emerges as a potential strategic area for the CDB. All of these areas would require more intentional investment and greater internal capacity (see also Recommendation 4).
- A clearer strategy on digital literacy/digitalisation, including how to address equity (e.g., providing equipment for those in need, teacher retraining to use technology).
- A more deliberate strategy on how CDB can support BMCs with education sector governance, such as strengthening Education Management Information Systems (EMIS) and the approach to digitalisation of education.

Recommendation 2: CDB should use the ETPS update to further clarify its role(s) in the sector through dialogue with other actors in the region.

CDB has played numerous roles in the region – funder, coordinator, convenor, technical advisor, and advocate. There are expectations at regional and BMC level for it to play all of these roles to different degrees. However, CDB's role(s) in the sector must be considered in relation to other entities' roles and contributions to the education sector in the region, including the CARICOM Secretariat, Caribbean Examination Council (CXC), Organisation of Eastern Caribbean States (OECS) Commission, Caribbean Association of National Training Agencies (CANTA), others. Each of these bring something different to the table and what is required to transform education systems is a scaled up and coordinated approach to stakeholder engagement.

- **Coordination and convening:** CDB is recognised for its coordinating role and this is something it should enhance going forward. Some regional stakeholders and BMCs look to the Bank to scale up efforts to convene actors in the region to help define distinct roles and responsibilities of regional actors with regard to promoting a shift towards transformative education. A coordination and convening role is time-intensive and would require adjustments in CDB internal capacity.

¹ <https://today.caricom.org/2022/10/20/communique-issued-after-the-forty-fourth-meeting-of-the-council-for-human-and-social-development-cohsod-education-13-14-october-2022/>

- **Funding:** CDB continues to be a much-needed source of funding for BMCs and it should continue to allocate a large proportion of Special Development Fund (SDF) resources and leverage additional resources in order to provide financial support for critical initiatives in BMCs and regional institutions.
- **Advocacy:** If CDB intends to support transformation of education systems, then an advocacy role is seen as critical in order to continue to address inequities in the system, complex governance issues that remain unaddressed, and to work with BMCs to establish key priorities on the pathway towards a more transformative education system.
- **Thought Leadership:** Several of CDB's comparative strengths would allow CDB to support thinking on the future of education in the Caribbean in collaboration with other actors. In order to take on this role, however, it would need to prioritise certain thematic/issue areas and strengthen internal capacity (see recommendations 3 and 4).

Recommendation 3: In line with CDB's evolving knowledge management role, the ETPS update should respond to the demand for knowledge exchange and data in the education sector. CDB's role should be broadly communicated to state and non-state actors and development partners in the region.

Review findings indicate that the ETPS did not focus as much on evidence generation and creating a culture of evidence-based decision making. Yet this remains a critical priority for BMCs and regional partners. Stakeholders expressed interest in knowledge exchange and supportive activities that include:

- Sharing CDB's own project experience in the sector
- Organising and sharing critical documents and data sources
- Encouraging and sharing more research on key trends (labour market links to education); financial support for such research should also be considered
- Identifying and sharing promising practices in education systems in BMCs (e.g., identifying different centres of excellence for reference points for certain topic areas)
- CDB working with other actors (such as the Global Partnership for Education [GPE], the United Nations Educational, Scientific and Cultural Organisation [UNESCO], other International Financial Institutions [IFIs], and the CARICOM Secretariat) to strengthen national data systems and improve evidence base through M&E capacity at country level.

Recommendation 4: To meet expectations and ambitions, CDB will need to strengthen its organisational capacity to play different roles, continue to provide a range of financial and non-financial support, and communicate its contributions to education sector results in the region.

This requires combined efforts across all departments and divisions of CDB, including SSD, other areas of the Projects Department, the Department of Economics, human resources, and the communications team. CDB capacity to support the sector can be enhanced by:

- **Expanded human resources:** SSD staff and consultant complement for the sector is stretched thin and this limits the potential to play the different roles that are expected of the Bank. Coordination, for example, is a resource-intensive activity.
- **Enhanced communications:** There is a need for CDB to increase awareness of its strengths, priorities, and type of funding in BMCs. CDB needs to share more information about what the Bank is doing in this sector.
- **Stronger monitoring and reporting practice:** These practices are critical for improving results information on CDB's work in the education sector.
- **Clearer linkages to other CDB strategies:** There is a need to further integrate climate change and climate resilience priorities in the ETPS portfolio, including activities that focus on curriculum incorporating climate change, environmental sustainability, climate resilience and energy

conservation. Given the greater emphasis on youth in SDF 10, and the Youth Policy and Operational Strategy 2020, the Bank's education sector grants and loans should reinforce and strengthen resource allocation, activity design, indicator frameworks and reporting in these areas.

Acronyms

ARPP	Annual Reviews of Performance of Portfolio
BMC	Borrowing Member Country
CANTA	Caribbean Association of National Training Agencies
CARICHAM	Caribbean Chambers of Commerce
CARICOM	Caribbean Community and Common Market
CBET	Competency-based education and training
CCEP	Caribbean Centre for Educational Planning
CDB	Caribbean Development Bank
CSME	Caribbean Community Single Market and Economy
CTCS	Caribbean Technological Consultancy Services
CUT	Caribbean Union of Teachers
CVQ	Caribbean Vocational Qualification
CXC	Caribbean Examinations Council
DIMSOG	Disaster Risk Management Strategy and Operational Guidelines
DER	Development Effectiveness Review
ECD	Early Childhood Development
EMIS	Education Management and Information System
ETPS	Education and Training Policy and Strategy
EU	European Union
GE	Gender Equality
GEEP	Grenada Education Enhancement Project
GEPOS	Gender Equality Policy and Operational Strategy
GPE	Global Partnership for Education
HRD	Human Resources Development
ICT	Information and Communications Technologies
IDB	Inter-American Development Bank

IFI	International Financial Institution
IIEP	International Institute for Education Planning
ILO	International Labour Organization
M&E	Monitoring and Evaluation
MfDR	Management for Development Results
MOE	Ministry of Education
MSME	Micro, small and medium-sized enterprises
NTA	National training agency
OECS	Organisation of Eastern Caribbean States
OECD/DAC	Organisation for Economic Co-operation and Development / Development Assistance Committee
OIE	Office of Independent Evaluation
PPA	Project Preparation Assistance
RAP	Regional Action Plan
RCI	Regional cooperation and integration
RNPO	Regional Network of Planning Officers
SDF	Special Development Fund
SDG	Sustainable Development Goal
SEN	Special Education Needs
SPU	Strategic Plan Update
SSD	Social Sector Division
STEM	Science, Technology, Engineering, and Mathematics
TA	Technical Assistance
TOC	Theory of change
TVET	Technical and Vocational Education and Training
UK	United Kingdom
UNESCO	United Nations Educational, Scientific, and Cultural Organization
UNICEF	United Nations International Children's Emergency Fund
UWI	University of the West Indies

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2 Introduction

1. The Caribbean Development Bank's (CDB) Office of Independent Evaluation (OIE) commissioned a Review of CDB's Education and Training Policy and Strategy (ETPS). The review focuses on the period 2017-2021, aligned with CDB's current and previous strategic planning periods (2015-2019, 2020-2024).
2. The purpose of the review is to assess the performance of CDB's work in the education and training sector from 2017 to 2021 and inform an update or renewal of the ETPS by drawing lessons and making recommendations to improve the development effectiveness of the Bank's future strategies and programming.
3. The review was conducted by Universal Management Group (Universal Management Group or UMG) from February to December 2022. OIE convened an Evaluation Advisory Group to provide advice and guidance on the review. The Advisory Group was consulted during the inception phase to validate the inception report, approach and methodology and during the reporting phase to validate the preliminary findings and areas for recommendations and the draft report. Members of the Advisory Group provided input in writing and in three virtual validation sessions, aimed at facilitating and promoting use of the review. The review team also presented the conclusions and recommendations to the President of the Bank to get additional input.
4. The intended audience is the CDB Board of Directors, CDB staff and management, the education team in the Social Sector Division (SSD), and CDB Borrowing Member Countries (BMCs) and development partners in the region.
5. This report responds to the Terms of Reference (Appendix 1), describes the review methodology, presents the findings of the Review team, and provides conclusions and recommendations. The report is presented in five sections:
 - Section 1: Introduction
 - Section 2: Summary of the methodology
 - Section 3: Context of the education in the Caribbean and CDB's internal context and work in the education and training sector over the period 2017-2021
 - Section 4: Findings of review
 - Section 5: Conclusions and recommendations.
6. Appendices include the Terms of Reference (TOR), Methodology, Review Matrix, and supporting documents.

BACKGROUND ON THE ETPS

7. In line with its overarching objective to reduce poverty in the region and contribute to sustainable development, CDB identified education and training as one of its core areas of work. The Bank has had a long history of engagement in the education and training sector, first formally defined in its 1993 Human Resource Development Policy, which was superseded by the 2004 CDB Education and Training Policy and

Strategy. The policy underwent a comprehensive review and revision in 2016², resulting in the 2017 Education and Training Policy and Strategy (ETPS), which is the current guiding framework for CDB's work in the sector.

8. The overall goal of the 2017 ETPS is to improve the quality of education in BMCs, leading to increased learner outcomes producing a qualified, capable and representative workforce of diverse individuals, to reduce poverty and achieve inclusive social and economic development for the region. The Policy has three objectives, namely: (a) to develop education and training systems that provide for equitable access and participation across all levels of the system, (b) to enhance efficiency, relevance and effectiveness of education and training to create systems that are responsive to national, regional and global labour markets, and (c) to strengthen capacity to reform and manage education systems to enhance student outcomes (governance).

9. The ETPS highlights learning as a life-long activity. It covers all education sub-sectors: Early Childhood Development (ECD), primary and secondary education (basic education), post-secondary/tertiary education, and Technical and Vocational Training (TVET). It also pays special attention to equity and gender equality (GE) in light of the persistent challenges with special needs education, gender inequality (e.g., in Science, Technology, Engineering, and Mathematics [STEM]), language education for minority groups and discrepancies in access and quality of education in urban vs. rural areas.

² See Armstrong, L.A. (2016) *Revision of the Caribbean Development Bank's Education Training Policy and Strategy – Final Report*. October 2016.

3 Methodology

3.1 Overview

10. This section provides a summary of the review methodology. Please see Appendix 2 for the full methodology.

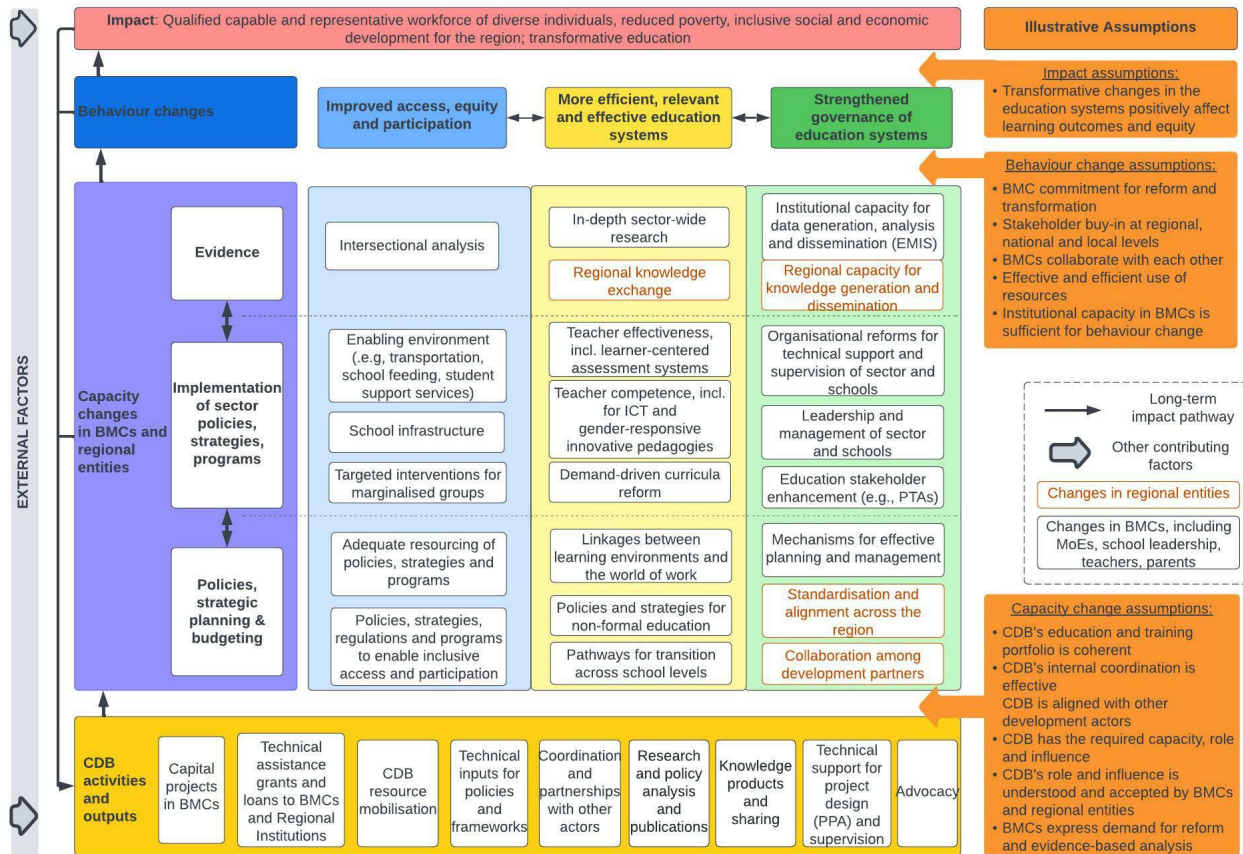
3.2 Approach and Framework

11. The review was guided by a Theory of Change (TOC) and a review matrix. In consultation with CDB stakeholders, the review team developed a working TOC for the ETPS that was used to compare the policy's intentions, underlying assumptions, expected results and planned implementation strategies with what actually transpired over the review period. The TOC informed the Review Matrix and helped frame the data collection, analysis and findings of the review. The TOC is based on the ETPS's partial results framework and its contextual framework³, as well as insights gleaned in interviews and the TOC workshop with CDB stakeholders in April 2022. The working TOC has since been updated to reflect findings from the review (see Figure 2.1).

12. The review team put special emphasis on gender and equity dimensions. This was done in a cross-cutting way and was integrated into the questions and indicators in the review matrix, the approach in each of the illustrative cases, the identification of key stakeholders to interview, and the review of secondary data (such as the CDB portfolio).

³ See Annex 1 and paragraph 4.08 of the 2017 ETPS.

Figure 3.1 Working TOC for the ETPS Review



13. The Review Matrix identifies key questions, sub-questions, illustrative indicators, and the anticipated sources of data and data collection methods. The review addressed questions on the performance of the ETPS, including its portfolio of investment projects and technical assistance (TA), and the CDB’s non-financial interventions to support the ETPS. Table 2.1 provides an overview of the key questions. The full Review Matrix is provided in Appendix 3.

Table 3.1 Overview of the Review Questions

AREA OF INQUIRY	QUESTIONS
Relevance	<p>How appropriate and responsive is the ETPS design given evolving needs, policies, priorities and lessons learned about education and training in national, regional, sub-regional, and global contexts?</p> <ul style="list-style-type: none"> • Relevant to national and regional stakeholders • Aligned with other CDB policies • 21st century challenges, imperatives and lessons?⁴

⁴ 21st century challenges and imperatives include digitisation, equity and gender equality, life-long learning, and curriculum that reflects that 21st century skills.

AREA OF INQUIRY	QUESTIONS
Effectiveness and Sustainability	How effective is the ETPS in achieving its three objectives? <ul style="list-style-type: none"> • Contributions to capacity change in each of the three objective areas (as per the TOC) • Are capacity changes in BMCs and regional institutions likely to be sustained?
Factors Affecting Performance	What are the key factors affecting the performance of the ETPS? <ul style="list-style-type: none"> – Exogenous factors (national, regional, global), including BMC capacities – Internal CDB systems and other capacities – CDB leverage of its reputation and strategic role in the sector
Lessons Learned	What lessons can be drawn from the Review findings about the relevance, effectiveness and sustainability of the results of ETPS investments, in order to enhance future programming?
Recommendations	What recommendations can be made to improve the design, implementation, management and monitoring and evaluation (M&E) of the existing and prospective ETPS portfolio? What recommendations can be made regarding the strategic role of the CDB in the education and training sector?

3.3 Data Collection Methods

14. The review team primarily used qualitative methods, drawing from secondary data found in documents and generating primary data through individual and group interviews. The review did not involve surveys or site visits for observations. The team used two overall framings to help answer the review questions:

- Illustrative cases, which provided an in-depth review of work in certain priority areas of the ETPS.
- Broad-based review, which encompassed the portfolio review, regional stakeholder consultations, and interviews with all BMCs.

3.3.1 Illustrative cases

15. Illustrative cases were used to examine the performance of ETPS as per the reconstructed TOC and to understand how various elements in the TOC converged to produce observed changes and results in three areas: Basic Education; Post-secondary/Tertiary Education, TVET; and Special Education Needs (SEN). An overview of the three cases is presented in Table 2.2. See Appendix 2 for details on selection criteria.

Table 3.2 Illustrative cases

EMPHASIS	RATIONALE	COVERAGE ⁵
CDB support for Basic Education	The case covers support for primary and secondary education under the 2017 ETPS and will consider types of contributions under each of the three ETPS objective	5 projects in 5 countries (Grenada, Haiti, St Vincent and the Grenadines (SVG), Antigua and Barbuda, St. Kitts and Nevis)

⁵ The list of projects is provided in Appendix 9.

EMPHASIS	RATIONALE	COVERAGE ⁵
	areas, including the more recent evolution of CDB support in this area.	7 regional activities COVID-19 response (including the Model Learning Recovery and Enhancement Programme for Caribbean Schools “Let’s REAP”), digitalisation measures, and Framework for the Re-opening of schools)
CDB support for post-secondary education, especially through TVET	Given that TVET covers secondary and post-secondary education, the Review looks at TVET on an education continuum. As such, TVET interventions were assessed in relation to broader CDB’s efforts in secondary and post-secondary education. TVET has been a core area of CDB support prior to and under the 2017 ETPS. TVET has been part of efforts to ensure alignment of education systems with workforce requirements. Partnership with private sector is an important dimension in this area. TVET is part of the Bank’s Regional Cooperation Initiative programming.	7 projects in 4 countries (Grenada, Guyana, SVG, Antigua and Barbuda) Regional activity involving regional organisations and other BMCs Select secondary and post-secondary interventions that link to the principles of a continuum and to the specific initiatives in TVET.
CDB support for Special education needs (SEN) across sub-sectors	Although it is only one dimension of equity, there have been specific (albeit fewer) investments in this area, and this was identified as a gap by CDB. Support in this area has intensified in the past couple of years. CDB is conducting a study of the SEN in the region and developing a model SEN policy and strategy. For the Bank, this is a key group to consider from an equity perspective.	4 projects in 2 country (Grenada, Guyana) and 2 regional projects. COVID-19 response initiatives have given more emphasis to SEN COVID-19 response (including “Let’s REAP”) and digitalisation measures

3.3.2 Portfolio Review

16. The team mapped out the ETPS portfolio in terms of investment size, maturity, type, country and regional distribution, and education sub-sector foci. During the data collection phase, the team further characterised investments by: a) mapping projects against ETPS objectives; b) identifying the types of education system capacities being addressed, including infrastructure, teacher effectiveness and curriculum development, building an evidence base, etc.; and c) examining the GE dimensions, the SEN dimensions, the climate resilience dimensions, and the digitalisation dimensions in each of the projects.⁶ This informed review questions on the extent to which the portfolio is coherent and aligned with ETPS strategic goals, including the extent to which initiatives at country and regional levels are linked and mutually reinforcing, and informed analysis of alignment with other CDB policies.

⁶ For instance, the team drew on the ETPS (Appendix II) and the CDB’s Sector Note on gender mainstreaming in the education sector to inform the review in this area.

3.3.3 Document Review

17. The team reviewed a wide range of documents relevant to the ETPS, CDB project investments and non-financial interventions, the strategic context for investments, and the development context for the education and training sector in the region. Document review was guided by the questions in the review matrix and examined the following types of documents:

- **CDB corporate documents**, including Strategic Plans (2015-2019, 2020-2024 and 2022-2024 Update), Annual Reviews of Performance of Portfolio (ARPPs), Development Effectiveness Reviews (DERs), Annual Reports, and Special Development Fund (SDF) 10 replenishment reports.
- **CDB sector documents**, including the Education and Training Policy and Strategy (2017), Gender Equality Policy and Strategy (GEPOS 2020-2024), 2021 Disaster Risk Management Strategy and Operational Guidelines (DIMSOG), the Climate Resilience Strategy (2019-2024), 2016 Private Sector Development Strategy and the 2020 Youth Policy and Operational Strategy.
- **CDB evaluations and reviews**, including evaluations and reviews of the Basic Needs Trust Fund (BNTF), Special Development Fund, CDB's GEPOS (2018), CDB's DIMSOG (2018), CDB's Approach to Management for Development Results (MfDR) (2021), and CDB Technical Assistance (2021), and the Organisation of Eastern Caribbean States (OECS) Country Strategy Paper (CSP) cluster evaluation (2018).
- **CDB portfolio documentation**, including 26 TA and investment projects approved in 2017-2022, plus key TVET projects from 2016.
- **CDB country strategies**, including Country Engagement Strategies, aide memoires, Country strategy Programme Evaluations (CSPEs), country strategy completion reports, when available.
- **BMC-focused documentation**: In the countries identified for illustrative cases, this included relevant documents, studies and reports shared by stakeholders in BMCs.
- **Publications and strategies from partners in the education sector**, including relevant strategies, research studies and evaluations by regional institutions, such as the Caribbean Community and Common Market (CARICOM) Secretariat, OECS Commission, and by CDB's multilateral development partners, such as the Global Partnership for Education (GPE), the International Labour Organization (ILO), and the United Nations Educational, Scientific, and Cultural Organization (UNESCO).

18. See Appendix 4 for a list of the documents reviewed.

3.3.4 Stakeholder consultations

19. The review team worked with CDB to identify a purposeful sample of knowledgeable stakeholders to interview using principles of adequate coverage of the review questions, appropriate representation of different regional BMC contexts and illustrative case studies, and the review budget for data collection. Interviews were guided by protocols (see Appendix 5) developed during the inception phase and were conducted virtually. See Appendix 6 for a list of stakeholders consulted.

20. Interviews and group discussions were conducted with 105 individuals (55 percent male; 45 percent female) and included:

- CDB: 18 individuals

- BMCs: 58 individuals (all 19 BMCs), including representatives of governments, teachers, principals, chambers of commerce and youth. The team conducted interviews with a broader set of stakeholders in 5 BMCs (Antigua and Barbuda, Grenada, Guyana, Haiti, St. Vincent and the Grenadines) and a combination of group discussions and individual interviews with Chief Education Officers and Education Sector Planners across all 19 BMCs.
- Regional entities: 20 individuals (e.g., OECS, CARICOM, Caribbean Chambers of Commerce [CARICHAM], Caribbean Association of National Training Agencies [CANTA], Caribbean Union of Teachers [CUT], University of the West Indies [UWI], Caribbean Examinations Council [CXC].)
- Development partners: 9 individuals (UNESCO, GPE, ILO, Inter-American Development Bank (IDB), European Union (EU), Canada, United Kingdom (UK), Foreign, Commonwealth & Development Office (FCDO), Open Development and Education, INMED Partnerships for Children.

3.4 Data Analysis

21. To maximise the quality of data and mitigate the risks and constraints inherent in individual data collection tools, the review team used several processes to check and clean data. These included: (i) written interview notes were reviewed immediately after the conversation to identify areas requiring clarification; (ii) document/desk study data was excerpted directly from the sources to ensure accuracy; (iii) data aggregation was guided by the review matrix and quality controlled by the Team Leader. The review team gathered regularly for analysis meetings (via MS Teams or other platforms) to discuss and cross-reference the results of each line of inquiry, identify patterns and outliers, and start drafting emerging findings.

22. To analyse data, the review team employed qualitative (descriptive, content, comparative) and quantitative techniques.

- **Descriptive analysis** was used to describe the internal and external contexts of the ETPS, including its institutional arrangements and activities to support implementation, and to describe key elements characterising equivalent policies or strategies of development partners in the region.
- **Content analysis** constituted the core of the qualitative analysis. The team developed a framework for coding and analysing interview data and for document review. The framework was closely aligned with the review matrix and enabled both case analysis and analysis that cuts across different sub-sectors and themes.
- **Quantitative analysis/descriptive statistics** were used to interpret quantitative data from the portfolio using Excel.
- **Qualitative data analysis:** The evaluation team used Dedoose, a software that allows multiple users to engage in the analysis of qualitative data. Dedoose allowed for the storage and integrated analysis of data deriving from the review's different lines of inquiry and identify correlations. It facilitated the coding of different media (interview notes, documents of all kinds, etc.) to enable the analysis in thematically-specific ways and according to various descriptors (e.g., by stakeholder type, by country, by gender, etc.). It also allowed for converting qualitative interview data into some quantitative content analysis (e.g., frequency of codes).
- **Comparative analysis** was used to study and contrast findings emerging from thematic cases, BMCs, types of illustrative results, types of projects or initiatives, and stakeholder groups. To the extent possible, the review team compared the approaches of CDB and other development partners in the education sector.

23. Overall, the review sought to improve reliability of information and increase the quality, integrity and credibility of the findings and conclusions through the triangulation of data. To the greatest extent possible, the team based individual findings on several lines of inquiry and data sources.

3.5 Limitations

- Availability of key stakeholders (BMCs and regional institutions): Due to the fact that the data collection was conducted during summer months and the additional strain on people working remotely, key stakeholders in BMCs and regional entities were not readily available for interviews. OIE supported the review team in reaching out to relevant stakeholders through introductory letters and several follow-ups. To increase the pool of potential interviewees, the review team reached out to individuals through their own networks. In addition, the data collection phase was extended from two to four months (June – September 2022). With the combined efforts of OIE and the review team, 105 individuals were consulted, surpassing the aspired number of 90. Given the context in Haiti, the review team was not able to conduct interviews with an extensive set of stakeholders but complemented insights on Haiti with information from documents and CDB staff. The report incorporates viewpoints on Haiti by triangulating with other lines of evidence.
- Staff turnover in BMCs: Over the review period, BMCs experienced frequent staff turnover in ministries and other entities supporting the education systems. Therefore, some stakeholders interviewed had not yet been familiarised with the work of CDB and had limited knowledge of CDB's contribution in the sector. To the extent possible, the review team triangulated information shared with other data sources.
- Availability of documentation: The review team had limited access to key CDB documentation, in particular reporting that would provide an indication of progress towards planned results. Project supervision reports on CDB's education and training portfolio were not available to the review team. Documentation on Basic Needs Trust Fund (BNTF) and other funding mechanisms were also not readily available. In addition, certain CDB initiatives were under development (such as a knowledge hub or knowledge management strategy), and up-to-date documentation was not available at the time of writing the report. To accommodate for the limited reporting, the review team conducted broad-based consultations, including through more in-depth consultations in five BMCs. The review team also drew on findings from existing assessments and evaluations (e.g., 2021 Review of CDB's approach to MfDR, 2018 Cluster Country Strategy Evaluation).

4 Context

4.1 Caribbean Education Context

24. This section provides an overview of the education context in the Caribbean, with emphasis on the current education priorities in the region: i) access; ii) quality; iii) governance. It also includes sections on: iv) cross-cutting 21st century challenges; and v) navigating external shocks. The section is mainly based on analysis of interview data from stakeholders in BMCs, complemented by interviews with regional entities, development partners, key documents and relevant literature. See Appendix 7 for some of the main priorities and challenges highlighted by BMCs.

4.1.1 Priorities around Access to Education in the Region

25. CDB's core mandate is to support BMCs in realising their development aspirations. A key priority in the region is access to education and training to improve overall social and economic development outcomes. This includes access to learning from early childhood, through to tertiary education, and lifelong learning opportunities.⁷

26. BMCs—with the exception of Haiti—report having attained Universal Primary Education, while many have also achieved Universal Secondary Education.⁸ Tertiary school enrolment data is patchy and unreliable; that data which is available indicates that access to tertiary education varies across the region, with some BMCs recording higher numbers than others.⁹ TVET, which spans both secondary and tertiary education, has been a strong focus in the Caribbean in recent years due to its perceived ability to stimulate employment and economic growth; however, negative societal perceptions of TVET (i.e., that it is less valuable or less preferable to academic education) pose challenges to participation and enrolment, according to BMCs.¹⁰ As ECD services remain limited in many BMCs and are often privatized, BMC stakeholders highlighted equitable access to ECD as a key priority for the region, including building public facilities, and increasing teaching capacity for ECD.

27. Barriers to education and training are strongly related to socio-economic inequalities (e.g., income, location, and gender).¹¹ For instance, BMCs indicate that people from poorer families are less likely to have the time and resources to dedicate to formal education, while people living in remote islands/areas of the Caribbean experience considerable difficulties in attending school due to long commuting distances and a lack of internet connectivity for online learning.¹² Similarly, gender norms also foster low rates of formal education enrolment among men and boys at the secondary level and beyond, while women and girls face

⁷ CDB (2020) *CDB Strategic Plan 2020-2024, Transforming Lives*.

⁸ CDB (2015) *CDB Strategic Plan 2015-2019*.

⁹ World Bank (2020) *School enrolment, tertiary (% gross)*.

¹⁰ CDB (2017) *Education and Training Policy and Strategy*.

¹¹ UNESCO (2020) *Latin America and the Caribbean Inclusion and Education: All Means All*.

¹² These concerns expressed by BMCs are also reflected in various examples and discussions in: UNESCO (2020) *Latin America and the Caribbean Inclusion and Education: All Means All*.

low enrolment in TVET education, especially in higher-paying vocational industries (e.g., construction) compared to lower-paying service-oriented industries (e.g., nursing).¹³

28. Access to education is not only stifled by external socio-economic factors, but also the internal capacity and resources of the education sector. Access to learning for students with SEN and disabilities is particularly limited by a lack of specialised learning facilities and teaching approaches. General infrastructure projects (i.e., schools and TVET centres) were previously a priority for BMCs and CDB in an effort to improve general access to education, but the focus has now evolved to ensure that no one gets left behind, and that access also fosters quality education outcomes.¹⁴

4.1.2 Priorities around the Quality of Education and Training

29. BMCs are widely concerned about learning gaps that persist despite access to education and training. The perception is that some students who are enrolled in school are not performing at their grade level.¹⁵ This is largely attributed to low levels of student attendance and a low supply of qualified teachers. Issues with curriculum and assessment are also important factors to consider.

30. BMCs consider teacher training as a key mechanism to tackle challenges in education quality. Training priority areas include: a) contemporary teaching approaches that move beyond rote memorisation and that emphasize differentiated instruction to ensure each learner's needs, interests, strengths, and gaps are taken into account; b) an expansion of education into holistic, non-traditional subjects such as life skills, emotional intelligence, creative arts, home education, TVET, etc.; c) SEN diagnosis, assessment, and specialised teaching approaches, including the use of special tools and equipment; d) the integration of Information and Communications Technologies (ICTs) into teaching to add value to teaching-learning experiences and environments (this became a particularly strong priority to allow the continuation of quality education in the face of COVID-19).

31. The bar of expectations has been raised for teachers and instructors in the region, as they are increasingly expected to have a wider range of competencies in terms of educational approaches and tools. While specialised spaces and tools for SEN, TVET, and ICT are needed for quality education, BMCs emphasise that it is essential for teachers to be properly trained and encouraged to use them to ensure quality education.

4.1.3 Priorities around the Governance of Education

32. Governance is a key component identified by BMCs for managing education systems towards enhanced student outcomes. Governance encompasses local and national governments, as well as schools and stakeholders such as policymakers, principals, students, parents, and communities.

33. Across BMCs, many Ministries of Education (MOE) have identified deficiencies in processes required for enhanced governance, including in the education sector plans, but have faced challenges in

¹³ CDB (2017) *Education and Training Policy and Strategy*.

¹⁴ CDB (2021) *SDF 10 Replenishment Report*.

¹⁵ CDB (2020) *Youth Policy and Operational Strategy*.

addressing them. As highlighted in the 2017 ETPS, there is often an absence of standards, accountability, transparency, and reliable data for education, all of which are needed to evaluate an education system's performance and support stakeholder engagement in evidence-based decision-making. There is also limited research capacity to inform decision-making, and many BMCs lack the capacities at both school and system levels for efficient and effective leadership of the sector.

34. To improve governance, stakeholders identify leadership, program implementation frameworks and M&E systems, as key ingredients. Leadership is viewed as an essential tool to advance innovation and motivation in the education sector. Meanwhile, i) frameworks for ensuring proper implementation of projects; ii) availability of quality data; and iii) M&E processes that follow common standards of accountability and transparency, are seen as essential in informing evidence-based decision making by leaders.

35. Teachers' unions noted the need for a stronger voice for teachers in the planning and strategizing of government policies and plans related to education, highlighting their role as first-level implementers of those policies on the ground. Trained and proactive school principals that can provide teachers with the support and guidance they need, as well as the representation of teachers' unions on national and regional bodies, are seen as two key contributing factors for effective education governance. Strong student leadership, such as through diverse and empowered student councils, were also mentioned by BMCs as useful governance mechanisms. Similarly, it was mentioned that M&E systems should include the voices of students, not just parents, teachers, and principals. BMCs commented that many of these contributing factors to education governance currently operate in an ad hoc manner and would be improved through clear policies and frameworks. CDB has recognised these deficiencies and initiatives such as Let's REAP offer a different approach in this area.

36. Over the past decade, the region has made progress in developing policies, frameworks and initiatives to improve education systems in countries (see Appendix 8 for summary list). The CARICOM Secretariat and the OECS Commission, in collaboration with CDB and other actors, have played key roles in driving change and supporting countries in their reform initiatives.

37. Limited M&E processes are due to insufficient financing and limited capacity of M&E systems, many of which are outdated (e.g., databases relying on paper-based systems, rather than digital). Data collection and disaggregation, and subsequent use for the analysis of education systems is limited. The data that is available is not able to adequately inform new policies, recommendations, and frameworks to inform the future of the education system.

4.1.4 Cross-Cutting 21st Century Challenges

38. BMCs highlighted the following 21st century challenges which cut across access, quality, and governance dimensions of the education and training sector: inclusive education, SEN, GE, holistic education, digitalisation/ICT, environment and climate change, and M&E.

39. Inclusive education, which is a key priority for the education and training sector in BMCs, means that all students are accommodated for and made to feel valued in the classroom. In terms of SEN, dedicated infrastructure, tools, trainings, and systems that can provide access to quality education for all learners are needed; meanwhile, all of these elements rely on functioning governance systems in order to be sustainably implemented. Beyond SEN, there is also a challenge to make education more inclusive in other dimensions (e.g., for people from low-income households, for people living in rural areas, for linguistic minorities and

Indigenous communities). Inclusive education efforts in BMCs have aimed to reduce barriers to access, such as by providing free school meals (e.g., in the Cayman Islands, Antigua & Barbuda, Jamaica), and by exploring the removal of school entrance examinations at the secondary school level (e.g., St. Kitts and Nevis). Gender equality is considered a key dimension of inclusive education; gender stereotypes continue to affect students at all levels and types of education, as reflected in the higher representation of women/girls in tertiary education and men/boys in TVET generally, and further, in the gender stereotypes reaffirmed within TVET education (e.g., women in food and nutrition, and clothing and textiles; men in building and furniture technology, electronics, etc.)

“We have to redefine what it means to be educated and competent. We need to make curriculum adjustments and teach for competencies and move away from content focus. Students have to graduate from tertiary or TVET institutions with the right skill sets. This has implications for national systems and regional stakeholders like CXC and universities. We need to make connections between the school and the world of work, to accelerate the development of required competencies. We need to reengineer education over time.” – Regional stakeholder

40. Some regional stakeholders identified the main challenge to education as the need for wholesale change and “transformation” across the sector. Transformational change is understood as a holistic and fundamental change throughout education systems, reflected in teaching, learning, mind sets and management in the sector. This entails adequately training teachers and principals to take a transformative approach to education that includes considerations of SEN, inclusivity, and gender, while also offering alternative methodologies and subjects that can motivate all learners. TVET and the inclusion of comprehensive programmes for the acquisition of practical skills, at both secondary and higher levels, are examples of this. The overriding need is for education systems in the region to become more responsive. Some stakeholders in BMCs and regional entities noted that systemic change requires a “paradigm shift” and new thinking in the sector and new ways of stakeholders working together, impacting relationships between education and other social, environmental and economic sectors.

41. BMCs continue their efforts to meet the needs of labour markets for skilled labour for employment, especially by strengthening TVET opportunities and putting in place Caribbean Community Single Market and Economy (CSME) arrangements for the movement of people and services. However, BMCs noted key 21st century challenges for the TVET sector. Access to TVET programmes is largely based on the ability to pay the cost of training and certification. For persons with disabilities, access is limited by inaccessible buildings, unfit-for-purpose classrooms and missing technology and learning assistance. Subsidised transport, including for rural populations, and day care provision for young mothers are key considerations. Opportunity costs (i.e., the perception that there is more to be gained financially by pursuing avenues outside of school for upward economic and social mobility, such as by directly entering the job market or engaging in criminal activity) were also mentioned as barriers, particularly for men and boys.

42. Digitalisation was a priority in the Caribbean pre-COVID but has accelerated greatly as a priority since, due to the quick transition to online schooling. This strong move towards digitalisation also includes a push to enhance digital literacy and knowledge of cybersecurity. Beyond online education, digitalisation also encompasses having ICT equipment in schools (e.g., smart screens, computers, monitors, tablets) and software for learning (open source and otherwise). Further, teachers must be trained and motivated to use the ICT and software to enhance education outcomes. These priorities also need to include equity and

inclusivity considerations for students lacking internet access in rural areas, parents with limited digital literacy to support their children in online education, students with SEN, etc.¹⁶

43. Climate change and environmental disasters also pose a huge challenge in the Caribbean, as rising sea levels threaten island states and external shocks such as tropical storms become more frequent and powerful. Beyond climate-resilient infrastructure for schools and universities, BMCs expressed that this challenge also needs to be further incorporated into educational curriculums, trainings, and research at multiple levels and for all stakeholders (students, communities, leaders, etc.). BMCs highlighted that all 21st century challenges and priorities need to be monitored and evaluated while carefully taking into consideration environmental and social factors, in order to facilitate crisis sensitive planning and climate resilience.

4.1.5 Navigating External Shocks

44. Frequent occurrence of natural disasters, such as earthquake and tropical storm Grace in Haiti, and the volcanic eruption of La Soufriere in St. Vincent and the Grenadines in 2021, as well as the global COVID-19 pandemic declared in 2020, have eroded some of the gains in access to education and exacerbated pre-existing inequalities and problems in education systems in the region.

45. Available data shows that nearly 7 million learners in 23 Caribbean countries and more than 91,000 teachers have been affected by school closures due to COVID-19.¹⁷ Within the education system, learning loss has been significant and even more profound for students from disadvantaged socio-economic circumstances, persons with disabilities and those who were already experiencing learning deficits before the onset of the pandemic. Across the Bank's membership, countries have reported learning loss ranging from 6 to 16 months.¹⁸ The loss of educational instruction has been accompanied by increased undernutrition due to disruptions to school feeding programmes, lost recreational and socialisation opportunities, increased mental health challenges, heightened poverty levels in households, and increased exposure to gendered roles at home and dangers such as child abuse and gender-based violence.¹⁹

46. BMCs' response to the pandemic has varied. While school closures were implemented across the Caribbean, radio, television, social networks, including school-community networks, and virtual learning platforms have been used widely to ensure learning continuity. Governments have piloted a range of online learning modalities and have tried to ensure universal access to devices, improved connectivity along with strengthened pedagogy for the distributed educational space.²⁰ Tertiary institutions had already built remote learning infrastructure over several decades, including the multi-campus distance education approach of UWI. Still, many children and young people in the region, especially those from poor and rural households and those with disabilities, were not able to leverage those facilities.²¹ Although Internet penetration is high

¹⁶ CEPAL (2021) *Selected online learning experiences in the Caribbean during COVID-19*. Policy Brief LC/Car/2021/3.

¹⁷ CDB (2021) *Strategic Plan Update 2022-2024*.

¹⁸ Ibid.

¹⁹ CEPAL (2021) *Selected online learning experiences in the Caribbean during COVID-19*. Policy Brief LC/Car/2021/3.

²⁰ UNESCO (2020) *Global Education Monitoring Report – Inclusion and education in the Caribbean*.

²¹ CEPAL (2021) *Selected online learning experiences in the Caribbean during COVID-19*. Policy Brief LC/Car/2021/3.

in most Caribbean countries, with the exception of Cuba and Haiti, quality and affordability of Internet access and infrastructure varies greatly between urban and rural areas and less-populated islands.²² The deployment and mass use of ICTs for teaching/learning are constrained by institutional deficits in the ICT infrastructure and human resource capacity.

47. In St. Vincent and the Grenadines, after months of school closures due to COVID-19, schools were set to resume face-to-face instruction on 12 April 2021.²³ On 9 April, only a few days before the planned reopening, La Soufriere volcano erupted, leading to massive evacuations and the extension of school closures for 33,000 children for an unknown period of time.²⁴ School closures seeped into and beyond the summer holidays, eventually a reopening through phased online and in-person learning took place on October 4th, leading to great education losses.²⁵ In Haiti, 1250 schools were destroyed or damaged by the earthquake on 14 August 2021, and one year later, the majority had still not been rebuilt, leaving more than 250,000 children without adequate access to schools.²⁶

4.2 CDB's Work in the Sector

4.2.1 Evolution of CDB's work in the education and training sector

48. Since the Bank's inception, CDB's work in the education and training sector has evolved in response to needs in the region. In the 1970s and 80s, prior to the CDB's first policy on human resource development, approved in 1993, the Bank's interventions largely encompassed TA activities carried out by the Caribbean Technological Consultancy Services (CTCS), BTNF, and student loans scheme.²⁷ The Bank's investments primarily focused on facilitating access to education through infrastructure, which remains a core area for the Bank. In the 1990s, CDB continued its focus on basic education infrastructure, while also expanding into curriculum reform and inclusive access to education, as well as human resource and institutional strengthening in BMCs.

49. Since the late 2000s, greater emphasis has been placed on policy development and strengthening leadership capacity, in particular education sector planning and statistics/M&E (e.g., supporting the Regional Network of Education Planning Officers) given the need for stronger evidence to inform education sector decisions in the region. More recently, the Bank has increased its efforts in the areas of universal secondary education, expanding access to ECD and teacher effectiveness (e.g., learning assessment systems, including formative and diagnostic assessments). CDB's work in TVET has taken on more prominence with significant

²² Bleeker, Amelia (2019) "Using universal service funds to increase access to technology for persons with disabilities in the Caribbean", Studies and Perspectives series-ECLAC Subregional Headquarters for the Caribbean, No. 79 (LC/TS.2019/59-LC/CAR/TS.2019/2), Santiago, 2019.

²³ Wong, Melissa (April 20, 2021) "Education suffers 'great blow' in volcano-affected St. Vincent." Loop News.

²⁴ Ibid. and Knight, Patrick (2021, Apr 15) "Education on hold in Saint Vincent as fallout from volcano continues." UNICEF.

²⁵ Loop News (2021, Sept 30) "5 things you need to know about the opening of schools in St. Vincent." Loop News.

²⁶ ReliefWeb (2021, Aug 18) "One year after devastating earthquake, more than 250,000 children in southwest Haiti do not have access to adequate schools – UNICEF."

²⁷ See CDB Education and Training Policy and Strategy, 2017.

investments approved prior to the 2017 ETPS and more recently in the context of regional cooperation and integration initiatives.²⁸

50. Over the review period, CDB has used an array of financial and non-financial modalities for implementing the 2017 ETPS, which include:

- A portfolio of investment projects and TA (loans and grants)
- Technical support for project design (project preparation assistance [PPA]) and supervision to executing agencies and partners
- Policy dialogue and technical inputs for policies and frameworks at regional and country levels
- Coordination and partnerships with other actors in the region
- Research and policy analysis
- Resource mobilisation efforts
- Knowledge products and sharing
- Advocacy (predominantly in the area of GE and inclusion).

51. Examples of CDB's use of these modalities and how they have contributed to the implementation of the ETPS are discussed below.

4.2.2 CDB's education and training portfolio

52. The portfolio of CDB investment projects and TAs in the education and training sector for the period 2017-2022 (including projects that were approved as of April 2022 or are expected to be approved later in 2022) included 24 projects.²⁹ A list of projects is provided in Appendix 9.³⁰

53. CDB has also provided support through community-level education and training interventions managed by the BNTF³¹ and the CTCS Network.

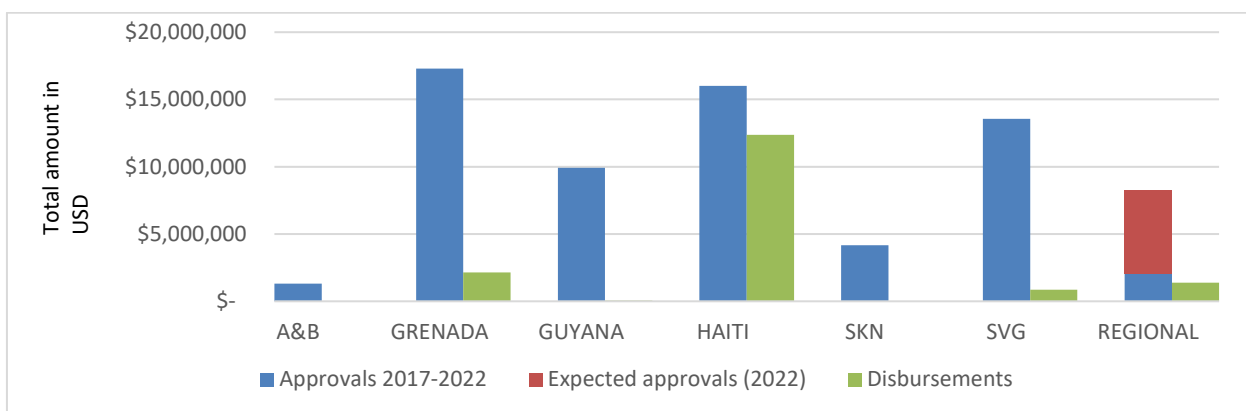
²⁸ For instance, initiatives funded by the EU Economic Partnership Agreement (EPA) and CSME Standby Facility.

²⁹ The review also looked at two TVET projects approved in 2016 as stakeholders considered them relevant interventions for the review period: Guyana loan and grant of USD12,252,000 for the TVET project "Skills Development and Employability"; SVG loan and grant of USD7,647,000 for the TVET project "TVET Development Project". However, these were not included in the financial analysis presented in this section.

³⁰ List does not include BNTF and CTCS interventions or more recent interventions, such as the Model Learning Recovery and Enhancement Programme for Caribbean Schools "Let's REAP" and the new knowledge development initiative.

³¹ The BNTF is currently in its tenth cycle and assists nine programme countries (Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, Saint Lucia, St. Vincent and the Grenadines, Suriname).

Exhibit 4.1 Total amounts approved and disbursed³² between 2017-2022 by country/region



54. Based on the information available to the team, over the period January 2017 to April 2022, CDB approved a portfolio of USD64.3 million (mn) from its Ordinary Capital Resources (OCR) and Special Funds Resources and expected approvals of USD6.2 mn by December 2022.³³ As shown in Exhibit 3.1, the portfolio covers country-specific interventions in six BMCs (Antigua & Barbuda, Grenada, Guyana, Haiti, St. Kitts and Nevis and St. Vincent and the Grenadines), as well as regional interventions that support multiple BMCs and/or regional entities. The majority of the funding goes to country-specific initiatives, while regional initiatives make up 12% of approvals (2017-2022). Overall, disbursements to date have been low, except for Haiti and regional initiatives. In addition to the portfolio of new approvals, CDB continued to support education initiatives approved prior to the review period, including education projects in the Bahamas, Barbados, St. Lucia and Suriname³⁴, as well as key interventions in the TVET sector, some of which are also listed in Appendix 9.

55. Loans make up 70% of the total amounts approved, while grants and TA grants account for 30%. The majority of the amounts approved (over 65%) come from SDF, while 22% come from OCR. A small portion (8%) is financed through special funding sources, such as the CARIFORUM-EU Economic Partnership Agreement (EPA) and Caribbean Community (CARICOM) Single Market and Economy (CSME) Standby Facility for Capacity Building and the IDB COVID-19 OECS Line of Credit.

56. In addition, over the review period, BNTF has allocated the majority of its funds to education initiatives. As of 2020, 73% of BNTF 9 funds were granted to 64 sub-projects in the education sector, specifically targeting the most vulnerable and underserved communities.³⁵ As of 2021, BNTF 10 planned to allocate 55% of its budget (USD16.8mn) to basic education with 71 sub-projects planned for implementation by 31 December 2024.³⁶

³² Disbursement data as of 25 April 2022.

³³ This calculation is based on the portfolio data available in Appendix 9, which does not include a comprehensive list of BNTF and CTCS projects. The list also does not include financial data of key initiatives such as the Let's REAP programme.

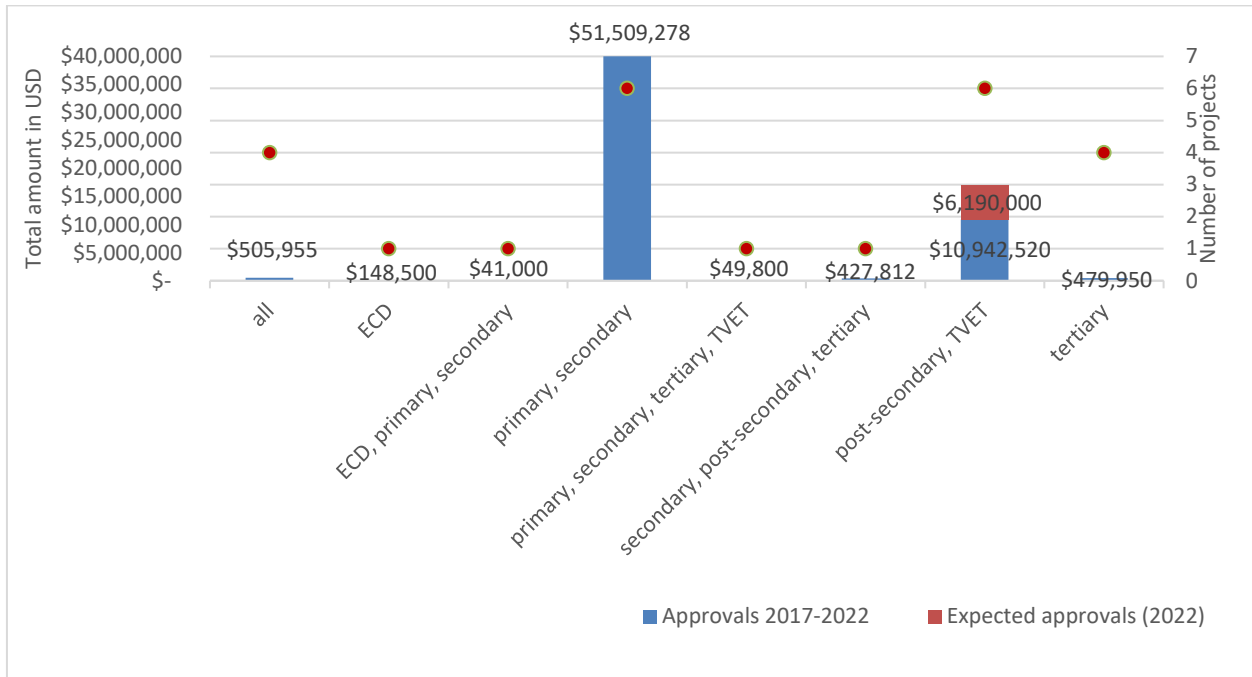
³⁴ See 2016 ETPS evaluation "Revision of the Caribbean Development Bank's Education Training Policy and Strategy" by L. A. Armstrong, Appendix D.

³⁵ CDB. *Special Development Fund (Unified) Annual Report 2019 and Financial Projections 2020-2022*. June 23, 2020.

³⁶ CDB. *Special Development Fund (Unified) Annual Report 2021 and Financial Projections 2022-2024*. June 13, 2022.

57. Reporting on the CTCS does not provide financial details disaggregated by sector. However, available CTCS reports mention key interventions that have been approved over the review period, including the two-year pilot project “Youth Entrepreneurship Education and Training in Haiti” with approximately USD611,000 from the SDF Haiti set-aside and a pilot project “Strengthening the Entrepreneurial Spirit of Caribbean Youth”³⁷ approved in 2018 and extended with additional resources of USD69,222 in 2020.

Exhibit 4.2 Total amounts approved and number of projects by education sub-sector (approvals 2017-2022)



58. Exhibit 3.2 provides data by education sub-sector. As CDB interventions often cover multiple sub-sectors as part of a project, only a simple categorisation based on appraisal reports has been feasible. The largest amounts approved are for projects focussing on primary and secondary education, followed by post-secondary/TVET³⁸ and tertiary education.

59. With the exception of two projects for which CDB was the sole funder, almost all of the projects include counterpart funding from governments, regional entities or development partners. For country-specific projects, governments provide an average of 15% of the project budget (between 0 and 42 %). For regional projects, counterpart funding is made available for an average of 22% (from 0 to 45%). Counterpart funding is provided by either regional entities directly benefitting from the intervention (e.g., CXC, OECS Commission, UWI) or project partners, such as UNESCO, the United Nations International Children’s Emergency Fund (UNICEF), and the CARICOM Secretariat.

³⁷ The project has been implemented in collaboration with youth development agencies in Barbados, Dominica, Jamaica, Saint Lucia, and Trinidad and Tobago.

³⁸ In addition, approximately USD20mn was approved to Guyana and SVG for TVET projects in 2016.

5 Findings

5.1 Overview

60. In accordance with the Review Matrix, this section provides the review team's findings on ETPS relevance, its effectiveness and sustainability, and factors affecting ETPS performance. Each section provides information triangulated with different lines of evidence and validated through a preliminary findings and conclusions workshop with the Advisory Group.

5.2 Relevance

61. This section provides insights on the relevance of ETPS design in light of evolving needs, policies, priorities and lessons learned about education in national, regional and global contexts. It looks at three key review questions:

- To what extent are the objectives and priorities of the ETPS relevant to national, regional and sub-regional stakeholders?
- To what extent is the ETPS portfolio aligned with other CDB policies?
- To what extent is the ETPS responding to 21st century challenges, imperatives and lessons?

Finding 1: ETPS provided a comprehensive framework aligned with the evolution of priorities in the sector expressed in relevant regional and national frameworks. The comprehensive nature of the strategy allowed CDB to address a range of education needs and priorities of BMCs, albeit with varying depth and breadth.

62. ETPS is a mainstream framework aligned with and relevant to a range of priorities in the sector expressed in regional and national frameworks for education and training development.

63. The ETPS framework aligns well with regional and national priorities. CDB involvement in the TVET sector provides a good example of the framework supporting priorities for regional integration and cooperation. The ETPS portfolio has supported the expansion of the Caribbean Vocational Qualification (CVQ) system, which is needed to facilitate the movement of people and services in the CSME region. CDB supported the development of the CARICOM Human Resources Development (HRD) Strategy 2030 by the CARICOM Secretariat and its use in BMCs. It helped (UWI) to address regional priorities for digitalisation in the education sector.

64. The ETPS aligns with OECS priorities expressed in its OECS Education Sector Strategy (OESS) 2012-2021. CDB funded the development of the OESS and supports its implementation through ETPS initiatives for education enhancement in Antigua and Barbuda, Grenada, St Kitts and Nevis, St Lucia and St Vincent and the Grenadines, as well as regional projects to support addressing SEN and education management. CDB continues to work closely with the OECS Commission supporting curriculum and

assessment reform, teacher professional development, leadership development, SEN, school transformation, learning recovery, resilience and the OECS COVID-19 Response and Recovery Strategy.³⁹

65. CDB's engagement in BMCs is tailored to meet the objectives and priorities of CDB country strategies, which are aligned with the ETPS. Education priorities in BMCs are often directly linked to other country priorities and national development goals, such as reducing violent crime, increasing employment rates or addressing gender disparities. Country strategy priorities vary between BMCs sometimes in degrees of emphasis only. For instance, Jamaica has a strong emphasis on integrating GE in education systems to address gender gaps, such as the higher rates of employment and earnings among males vs. females and poor educational outcomes and rates of violent crime among male youth.⁴⁰ In Belize, educational priorities are strongly tied into development priorities around economic growth and competitiveness, such as by using TVET to expand technical skills and workforce capacity in the energy sector.⁴¹ Country strategies integrate the different areas of the ETPS, covering the access, quality, and governance of education systems in diverse ways. The ETPS portfolio also responds to these priorities through its various initiatives.

66. CDB loans and grants, including those funded by BNTF, have responded to nationally identified gaps in TVET infrastructure and technical capacity, among other areas, while remaining consistent with regional priorities for TVET development mentioned above. For example, in Haiti, under SDF 9, CDB implemented more direct programming, including TVET projects that were financed solely by CDB, in line with priorities outlined in the 2017-2021 country strategy cycle.⁴²

67. The ETPS supports international frameworks such as the Sustainable Development Goals (SDGs) to which BMCs are signatories. In particular, the ETPS portfolio supports the achievement of SDG 4 (quality education), SDG 5 (GE), SDG 8 (decent work and economic growth) and SDG 10 (reduced inequalities).

68. The comprehensiveness of the ETPS is a deliberate strategy to help ensure that CDB, as the region's development bank, has the flexibility to address the critical gaps in education and training in BMCs. While other development partners, including the World Bank, European Union, United Kingdom and United States, are selective in what they support, CDB is more responsive and able to fill in gaps where necessary to ensure BMCs' needs are met. While creating more flexibility to address gaps, the responsive framework could create challenges in monitoring and communicating the results achieved in the ETPS. Indeed, results reporting and communication was an area of ETPS management that could be improved, and most ETPS stakeholders in the review were not clear about the nature of CDB support to the education sector beyond their area of work.

³⁹ OECS first identified its seven "imperatives" in education in 2011. They were re-examined in 2019 and found to all remain priorities, although the COVID-19 pandemic shifted the focus to include digital education. OECS priorities in education were re-iterated in the OECS Declaration on Education, February 2022.

⁴⁰ Jamaica Country Engagement Strategy, 2017-2021.

⁴¹ Belize Country Strategy Paper 2016-2020.

⁴² During the previous country strategy cycle, CDB co-financed projects with the IDB. When IDB stepped out of TVET sector, CDB filled the gap.

Finding 2: COVID-19 increased challenges, changed priorities and raised the bar in the sector and for CDB, while eroding past gains and progress in many BMCs. In response, CDB scaled up the importance of education systems in its strategy and made accommodations in individual projects.

69. The COVID-19 pandemic eroded past gains and progress in many BMCs and increased inequalities in BMCs and education systems (see section 3.1). It had an immediate impact on project/activity schedules and resource use, delaying the implementation of some project components. School closures and country lockdowns delayed teacher training and scholarships in Grenada, for example, and budget lines for ICT in projects were increased as training activities were delayed.

70. The pandemic created a sense of urgency for addressing challenges. It highlighted the need to improve internet access and online education and training delivery across the region and the need to develop the capacity of teachers and schools to direct, guide and facilitate online learning. It necessitated new ways for staff and school management to plan, function and interact. Coupled with pre-pandemic challenges, these new expectations raised the bar in the education sector and for the CDB.

71. In response to the pandemic, CDB made changes to its corporate and sector strategy, project designs and budgets, and provided guidance to BMCs and schools to recover from the pandemic's impact. After recently launching its (pre-pandemic) Strategic Plan (2020-2024), CDB developed a Strategic Plan Update (SPU) (2022-2026) rolling the plan forward toward priorities now shaped by the pandemic response. While education remained a key contributor to social resilience, the SPU added emphasis to addressing vulnerabilities and making sure no one gets left behind as well as taking concrete steps toward making transformational education a reality (e.g., through policy reform, developing ICT platforms, proving training and certification). In the SPU, education became more encompassing and integrated. The definition of 'education and training' was expanded to amplify ICT, monitoring and learning, governance, infrastructure and emotional intelligence.

72. CDB and regional partners supported education systems adapting to COVID-19. At a strategic level, CDB and CARICOM produced a Regional Framework for reopening schools, with attention to SEN students. Similarly, CDB supported development of Regional Guidelines for TVET Institutions and Implementation of CVQ during COVID-19. CDB, CARICOM and OECS Commission designed a comprehensive approach for enhancing and accelerating learning for all students and implementing a learning recovery and enhancement programme in Caribbean schools (Let's REAP). In OECS countries, two CDB projects approved during the pandemic supported families and micro, small and medium-sized enterprises (MSMEs).

Let's REAP. CDB has supported school transformation working in partnership with CARICOM and the OECS Commission. The partners developed the Let's REAP programme to provide school leaders and teachers in the region with a roadmap to both bridge the learning gaps that have emerged or worsened due to COVID-19 and, more generally, to improve inclusion and accelerate learning outcomes for all students. The programme was launched in July 2022. It will provide 15,000 educators (teachers, principals and Ministry of Education officials) with certification training in core areas of Let's REAP (e.g., Leadership for Learning). The training is being delivered by The University of the West Indies (UWI), Cave Hill Campus, School of Education. Education stakeholders from MOEs, the Caribbean Union of Teachers (CUT), teachers' training colleges, parents, students and development partners were consulted in the design process.

73. On 21 December 2020, CDB and the Inter-American Development Bank (IDB) signed a USD50mn loan agreement (IDB COVID-19 Loan Facility) to

support projects in response to the COVID-19 pandemic in member states of the OECS. Projects co-funded through this fund include St. Kitts and Nevis “Enhancing learning Continuity Project” and Antigua and Barbuda “Enhancing Learning Continuity and Resiliency Project.” The CDB-IDB loan agreement to support COVID-19 response project in the OECS members states provided conditional cash transfers to help families address broader socio-economic challenges, school-attendance grants for the vulnerable population, school meal support, financial support to MSMEs.⁴³

74. CDB approved reallocation of existing project funds in response to shifting national priorities/needs in Antigua and Barbuda, Grenada, Guyana and St Lucia. For example, under the Grenada Education Enhancement Project (GEEP): in response to COVID-19, MOE has prioritised mainstreaming its E-learning programme by providing ICT devices, with E-books, for all students and teachers, developing digital content to support instruction, providing internet access to all schools, securing free access from the telecommunications providers to selected online education sites by students and improving its Learning Management System. The government of Grenada has requested that funds approved under GEEP I be repurposed to procure ICT devices (14,869) for students and teachers, as well as providing training for teachers and content development.”⁴⁴

Finding 3: ETPS was aligned with and supportive of other CDB policies, at level of strategy more than implementation. These priorities were not consistently integrated across the ETPS portfolio. There were also missed opportunities for greater synergies with other areas of CDB’s work.

75. The ETPS framework and portfolio continued to align with and be supportive of other CDB policies and strategies approved in the 2017-2022 period. ETPS objectives align with the Strategic Plan (SP) and Strategic Plan Update (SPU) priorities in the education and training sector. The SP and SPU introduced ambitious notions of a holistic approach to education and transformational education being needed for building social resilience. The ETPS portfolio supports several initiatives with transformational goals and intentions (e.g., school transformation in Let’s REAP). The SPU places increased emphasis on priorities identified in the ETPS, such as addressing vulnerabilities, improving access to ICT and supporting policy reform in the sector. As CDB introduced “transformational education” to address challenges in the SPU 2022-2024, its role in the transformation of the sector was not well defined in the ETPS.⁴⁵

76. ETPS supports CDB priorities expressed in its Climate Resilience Strategy (2019), Youth Policy and Operational Strategy (2020) and Gender Equality Policy and Operational Strategy (2020). However, ETPS alignment with CDB policy is seen more in strategy than implementation. Priorities for gender were more consistently integrated across the ETPS portfolio than priorities for climate resilience and youth. Gender equality is a long-standing priority for the Bank and gender considerations are central to the ETPS. CDB provided guidance to partners on GE in project and activity design through training, TA, and the provision of guides/tools (e.g., see ETPS Appendix 2: Sample Activities for Integrating Gender Equality into the Education Sector). All ETPS initiatives score well in terms of gender mainstreaming.

⁴³ <https://www.caribank.org/newsroom/news-and-events/cdb-idb-sign-us50-million-loan-covid-19-response-oeecs>

⁴⁴ GEEP 2 appraisal, para 1.14

⁴⁵ CBD, SPU 2022-2024, page 16, para 5.09

77. Climate resilience and the risk that climate change poses to education are newer areas of concern for CDB and BMCs. Only half (14 of 26) of ETPS project appraisals mention climate and disaster considerations in alignment with CDB's disaster risk management strategy. CDB's focus has been providing climate resilient infrastructure, which it has done in 7 of 14 initiatives. Climate vulnerability assessments were also carried out in seven countries.⁴⁶ While few project appraisals mention climate in curriculum reform and teacher training, BMCs undergoing curriculum reform typically integrate climate change considerations at the secondary level. More consistent emphasis on and integration of climate change and climate resilience priorities might be expected in the future in the ETPS portfolio.

78. CDB placed more emphasis on training programmes for youth in the SDF 10 replenishment and new BNTF programme arrangements. Its Youth Policy and Operational Strategy (2020) makes reference to the ETPS (2017) and its objectives are aligned with ETPS objectives. The two key pillars of action in the Youth policy are “harnessing and enabling the strengthening of youth social and intellectual capacity via quality education” and “supporting youth awareness, education and action on climate change, disaster mitigation, environmental sustainability, and food security.” The ETPS portfolio recognises the importance of education for social and emotional skills development, self-control and conflict resolution, while addressing Youth policy priorities through its support to the TVET sector.

79. Beyond identification, CDB could integrate priorities in climate resilience and training of youth more consistently in ETPS projects in terms of resource allocation, activity design, indicator frameworks and reporting.

SYNERGIES WITH OTHER AREAS OF CDB WORK

80. CDB found important synergies in the work of its SSD and Regional Cooperation and Integration (RCI) unit to support TVET development in BMCs. Education plays a large role in regional integration plans. Strong TVET systems are required in CSME compliance and partnership arrangements. The RCI unit is conducting projects approved in 2022 in Antigua and Barbuda and St. Vincent and the Grenadines.⁴⁷ SSD and the RCI unit coordinate around new project requests from BMCs, provide expertise to project design, and seek to avoid duplicating work already done in countries.

81. There were missed opportunities for greater synergies with other areas of CDB's work. Under the ETPS, SSD could work with other units on common goals for the TVET sector in priority areas such as MSMEs, energy and agriculture. In 2017, CDB's Private Sector Development (PSD) unit initiated a programme with INMED Partnership for Children (INMED)⁴⁸ in Jamaica promoting small business and enterprise development through the transfer of aquaponics technology. Now in Phase 2, INMED trains farmers, youth, families and agriculture extension workers (trainers) engaged by Ministries of Agriculture in multiple countries. CDB could support the INMED programme under the ETPS to strengthen TVET systems. Similarly, CDB could support TVET development while providing training to MSMEs in sectors

⁴⁶ CDB Social Sector Division reports that climate vulnerability assessments were done in Belize, Dominica, Grenada, Guyana, Haiti, St. Lucia and St Vincent and the Grenadines.

⁴⁷ The CARIFORUM-EU Economic Partnership Agreement (EPA) and Caribbean Community (CARICOM) Single Market and Economy (CSME) Standby Facility has supported key TVET initiatives, including the TA in St. Vincent and the Grenadines on National Standardisation and Certification of Exportable Services Providers and the Enhanced Technical Vocational Education Training Framework for Certification in Antigua and Barbuda.

⁴⁸ <https://inmed.org/>

experiencing growth opportunities such as oil and gas in Guyana and Suriname and renewable energy across the region. The occupational areas selected for implementation under CDB's Skills Development and Employability Project – Guyana include the oil and gas sector, but according to stakeholders demand for capacity building outstrips training supply.

Finding 4: CDB's support has partially responded to "21st century challenges" in education and training, but responses are more fragmented than holistic.

82. As outlined in section 3.1, stakeholders consulted identified challenges to the education sector and systems in the region which the ETPS raised as "21st century challenges."

83. The ETPS portfolio has responded in varying ways to these challenges but without elaborating a coherent, holistic response to them. Some projects have responded to a range of challenges – the large-scale education enhancement programme in Grenada, for example, expands access to and use of digital technologies in the delivery of education and training, while also increasing awareness of SEN and to some extent accommodating special needs in training programmes. In order to set priorities for its contributions, CDB needs to identify its own role and value-added through the ETPS.

84. Sections below highlight ETPS responses to achieving GE, digitalisation, and climate and disaster resilience.

1) Achieving equity, equality and inclusion in education

85. Some national and regional stakeholders see CDB's emphasis on GE in the ETPS as being significant. CDB has been a major funder of the Caribbean Institute of Gender and Development (CGAD) project for most of the past decade. BMC stakeholders said CDB was a strong advocate for gender considerations in project and activity design. CDB has supported GE in various CDB products and services, including the provision of investment projects and TA, technical support for project design, policy dialogue and technical inputs, resource mobilisation and advocacy. In the rating system used to rate the integration of GE in its portfolio, 25 of 26 projects have a Gender Marker rating of "gender mainstreamed", while one project is rated "gender specific".⁴⁹

86. Gender considerations were consistently integrated into project design across the portfolio, although the scope and depth of GE aspects vary. All projects want to be gender-sensitive or gender-responsive, but not all provide specifics about how they will address gender-related inequalities in the education sector. Appendix 2 of the ETPS lists 12 sample activities for integrating GE into the education sector.⁵⁰ Based on ETPS portfolio appraisals, project designs include the following types of activities from this list:

- Training teachers, principals, assessors, project staff and parents for greater gender sensitisation (12 projects)

⁴⁹ The project rated "gender specific" is the regional project with UWI on "Addressing Inequities in Online Teaching and Learning at The University of the West Indies" approved in 2020. The project upgrades UWI information and communication technology and other remote learning solutions and builds the capacity of course instructors for the continued education of disadvantaged UWI students in response to the pandemic. It also aims to bridge the gender digital divide in the regional tertiary education institution, although the appraisal does not specify the measures taken to achieve this result.

⁵⁰ See Appendix 2 of the ETPS

- Collecting sex-disaggregated data to inform programming or policymaking (10 projects)
- Developing gender-sensitive or gender-responsive pedagogy and teaching capacity (7 projects)
- Providing gender-responsive infrastructure, including sanitary facilities, security and safety (7 projects)
- Creating avenues for young mothers to re-enter the education system and parenting support (e.g., offering childcare services) (3-4 projects).

87. While making progress since 2017 in implementing activities as elaborated above, CDB continues to roll out the list of activities in ETPS Appendix 2 for integrating GE in the education sector. At this early stage, project designs have paid less attention to the following activities:

- Developing early identification systems for identifying students at-risk for educational failure, who are often male (but increasingly also female) and also at-risk of engaging in anti-social behaviours
- Supporting curriculum reform to encourage male continuation in the system
- Implementing the Health and Family Life Education curriculum to include building positive gender roles modules, conflict resolution modules and life skills training
- Supporting the development of short course programmes which can be completed over time (laddering) to achieve recognised qualifications
- Supporting public education programming or campaigns which portray males and females succeeding in non-traditional roles
- Specifying in project appraisals a dedicated resource envelope for gender-specific activities.

88. The ETPS stresses the importance of GE in the education of both girls and boys. The portfolio includes initiatives to improve teacher effectiveness, such as gender sensitisation training designed to address challenges to student performance and training in differentiated learning to improve student experience and results. However, the portfolio addresses more issues facing girls and women than boys. Few projects target issues related to male drop-out rates, performance and anti-social behaviour, including through curriculum reform, public education campaigns or using prior learning assessment procedures⁵¹ and processes to increase access for boys and men to training. More can be done to support boys' education and breakdown gender stereotyping in TVET and STEM education.

2) Digitisation of education systems, schools, teaching and learning

89. In accordance with SPU priorities, the ETPS portfolio has increased its emphasis on digitalisation in system and school management and in teaching and student learning. This includes investment in Education Management Information Systems (EMIS) and more emphasis on online access to education, ICT use for student learning, and improving teacher ICT competencies. In the ETPS portfolio, 65% of projects (17 of 26) consider digital aspects to the project. CDB provided ICT equipment for students and schools, including for distance learning, in Antigua and Barbuda, Grenada, Guyana, St Kitts and Nevis and UWI. Digitalisation activities in the ETPS portfolio include:

⁵¹ This is the focus on the CVQ implementation across TVET projects financed by CDB including in SVG and SKN.

- Incorporating ICT into learning spaces through the provision of equipment, internet access, digital access to learning facilities (e.g., library, UWI TV), assistive technology for students with SEN, provision of devices and internet access for students in vulnerable households.
- Strengthening ICT in teaching through the provision of teacher training, e-learning strategy, digital toolkits for learning and assessment, cybersecurity toolkits and sensitisation, and ICT curricula (e.g., robotics, Internet of Things, cloud services)
- Strengthening ICT capacity of school leadership through training of principals and staff and development of e-waste management policies

90. As mentioned, 35% of projects (9 of 26) do not include activities focused on digitalisation. These are either regional TA initiatives to support policy development and sector planning (e.g., regional conference on ECD; development of a model SEN policy and strategy) or country-specific TVET initiatives. No project appraisal specifies funding allocation to digitalisation components, except for projects which have a primary focus on digitalisation.⁵² This includes two projects with UWI: the UWI digital transformation project and Addressing Inequities in Online Teaching and Learning at UWI.

3) Achieving climate and disaster resilience in education systems

91. Integrating climate and disaster resilience measures into CDB initiatives is a 21st century challenge highlighted in the SPU. In the ETPS portfolio, 54% of projects (14 of 26) mention specific climate and disaster resilience considerations, while 46% do not make any mention.⁵³ Of the projects with these considerations, eight projects focus on developing climate-resilient, energy-efficient, environmentally-sensitive infrastructure, including equipment, in alignment with CDB's Climate Resilience Strategy. In Antigua and Barbuda, Grenada, Guyana, St Kitts and Nevis, and St Vincent and the Grenadines, CDB funds climate-resilient school infrastructure and other measures such as Climate Vulnerability Assessments, engagement of environmental specialists, and preparing dedicated Disaster Risk Management (DRM) plans.

92. Individual projects also proposed the following activities. CDB could pay greater or more consistent attention to these activities in projects across its portfolio:

- Developing curriculum incorporating climate change, environmental sustainability, climate resilience and energy conservation
- Supporting communities and children impacted by emergencies and disaster
- Training teachers for differentiated instruction⁵⁴ and integration of Disaster Risk Reduction (DRR), energy efficiency

⁵² All ETPS projects which finance school infrastructure include modernizing the ICT infrastructure such as computer labs. The funding for this ICT infrastructure is not identified in separate project cost items, but rather included in the cost of school infrastructure.

⁵³ ETPS projects include both capital projects and TA projects. TA projects are narrowly defined and may not have a specific climate or disaster resilience focus.

⁵⁴ Differentiated instruction is the process of “ensuring that what a student learns, how he or she learns it, and how the student demonstrates what he or she has learned is a match for that student’s readiness level, interests, and preferred mode of learning.” (Tomlinson, Carol Ann, 2004, “Point/counterpoint,” *Roeper Review*, 26 (4), 188-189). Differentiated instruction means using different tools, content and due process in order to successfully reach all individuals. Teacher training for differentiated instruction is a core element of Let’s REAP.

- Sensitising stakeholders through training on the importance of strengthening Disaster Risk Management (DRM) capacity in the education sector
- Developing educational leadership for a transition to low-carbon climate-resilient economy
- Strengthening climate-related research.

5.3 Effectiveness and Sustainability

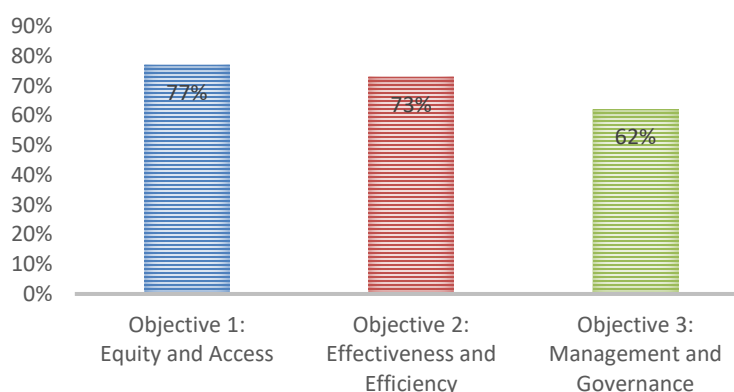
Finding 5: Available results data on ETPS indicate that CDB made positive differences in some areas of capacity development under each ETPS objective.

93. The reconstructed [Theory of Change](#) (TOC) used in the ETPS review includes three ETPS objectives – improving equity and access, effectiveness and efficiency, and management and governance in education systems – and three areas of capacity development – planning, implementation and monitoring.

94. The review found that CDB has made positive differences in some areas of capacity development under each ETPS objective. Overall, contributions have been stronger under objectives 1 and 2 than objective 3, and stronger in capacity change in planning and implementation than in monitoring or evidence gathering and use.

95. The 2017-2022 portfolio of 26 projects effectively covers the three objectives of the ETPS, albeit with more emphasis on objectives 1 and 2. About 35% of projects (9 of 26) clearly include components that touch on all three ETPS objectives.

Exhibit 5.1 Percentage of projects that focus on ETPS Objectives



96. **Contributions to capacity change.** CDB made contributions to capacity change across the three ETPS objectives. It made meaningful progress in strengthening policy and planning in education systems and the implementation of capacity building and infrastructure projects.

97. CDB support to school infrastructure is perhaps its most prominent and remarked upon contribution to education systems in the region. The ETPS portfolio includes five large-scale, multi-faceted education enhancement programmes in Antigua and Barbuda, Grenada, Guyana, St Kitts and Nevis, and St Vincent and the Grenadines, providing climate-resilient school infrastructure, SEN facilities and infrastructure, ICT equipment for students and schools, and training opportunities for sector and school leaders and teachers, including for the development of inclusive and differentiated teaching and learning in Caribbean schools.

The ETPS regional programme strengthens the capacity and work of UWI and other regional institutions, as well as BMCs benefitting from regional initiatives, particularly countries in the OECS.

98. **Capacity change for monitoring/evidence gathering and use.** While making measurable progress in areas of planning and implementation, the portfolio made less progress overall in capacity development related to education sector monitoring and evidence gathering and use.⁵⁵ Key factors affecting capacity change in these areas are low levels of expertise and weak or missing systems and tools for data management in BMCs. Mindsets and approaches have also presented challenges. Weak data systems and gaps in the availability of education data hinder the development of BMCs' education sectors.

99. Under the ETPS, CDB strengthened linkages between learning environments and the world of work through investment projects and TA in Guyana and Grenada and in the UWI TV regional project.⁵⁶ It has supported the CXC. However, stakeholders identified the weakness of data systems linking learning and labour market needs as a constraining factor and area of concern for the TVET sector.

Finding 6: ETPS/CDB made critical contributions to improved access through building school infrastructure and education facilities.

100. CDB/ETPS has improved access to education by investing in public schools at primary and secondary levels, in early childhood development (ECD) and basic education infrastructure through the BNTF, in TVET infrastructure, primarily at the secondary level, and in tertiary level institutions including UWI. As discussed in Finding 9 below, CDB has also helped develop national policies and strategies and sector plans aimed at improving access across the region and in selected BMCs.

101. **Support to primary, secondary and tertiary level schools.** CDB lending for school infrastructure is a central part of the CDB brand in education. Numerous stakeholders said CDB capacity to contribute to school infrastructure was a comparative strength.

102. Through investment projects under SDF 10, CDB has funded school infrastructure at primary, secondary and tertiary levels in various BMCs. In 2021, for example, 210 classrooms and educational support facilities were built or upgraded according to minimum standards (198 basic education; 12 post-secondary and tertiary).⁵⁷ About 29,395 students (14,142 girls) benefitted from improved physical classroom conditions and/or enhanced teacher competence. Under BNTF 9, 102 classrooms in basic schools were built or upgraded and 216 teachers (201 women) were trained,⁵⁸ improving the learning environment of 1,251 students (444 girls). BNTF sub-projects in Belize, Jamaica, St. Lucia and Suriname provided skills training for 860 students (473 girls).⁵⁹

⁵⁵ CDB supported two key initiatives in education planning – support to the Regional Network of Planning Officers (RNPO) and monitoring reports on the CARICOM HRD 2030 Strategy, as well as training in education planning and management by the International Institute for Education Planning (IIEP) for education planners, statisticians, and MOE staff in non-OECS BMCs. These initiatives are discussed under Finding 9 below.

⁵⁶ In 2017, CDB approved a TA grant to UWI for the enhancement of UWI TV to expand and improve the quality of the university' multimedia public education programmes and information services. UWI TV is a cable channel and has a companion web and social media platform.

⁵⁷ SDF Annual Report 2021, table 3.3

⁵⁸ SDF Annual Report 2021, page 15

⁵⁹ SDF Annual Report 2021, page 30

103. In terms of targets for the 2020-2024 period, CDB delivered 55% of the projected number of classrooms and educational facilities, trained 15% of the projected number of teachers and principals, and benefitted 43% of the projected number of student beneficiaries as of 2021.⁶⁰

104. The enabling environment also impacts access to education. CDB has increased access for children from disadvantaged households in Haiti, St Kitts and Nevis, St Lucia and St. Vincent and the Grenadines, for example, through school feeding programmes, tuition waivers, financing transportation, and delivering empowerment sessions to enable parents/caregivers of school-aged children to better support learning at home.

105. CDB projects have encountered delays and slow processes affecting implementation. Human and financial resource constraints and supply-side issues have also reduced the efficacy of projects.⁶¹ Despite challenges, CDB contributions to school infrastructure have been significant. These results can be sustained if BMCs have developed plans and procedures to maintain infrastructure, training facilities and new equipment. Maintenance plans are usually a condition of infrastructure loans, projects often provide an initial maintenance kit, and training for maintenance has been delivered in some projects such as GEEP in Grenada.

106. Stakeholders cited contributions of BNTF to ECD and basic education infrastructure and programmes. In St Lucia, for example, CDB has provided financing to the ECD sector through BNTF grants to vulnerable communities, for building facilities, training ECD practitioners, and providing support to parents to improve their livelihoods. BNTF also supports a caregivers' programme to prepare children who are not in ECD for attending primary schools in the country. During the 2017-2022 period, as many as nine BMCs used BNTF grants for education and HRD, including livelihoods enhancement.⁶²

107. **Investment in TVET infrastructure at secondary level.** CDB is recognised as a key regional partner in the TVET sector. It has a long-time investment in TVET systems and schools in Guyana, Grenada, Antigua and Barbuda and St. Vincent and the Grenadines. TVET is not well established and integrated in OECS countries. CDB has primarily invested in TVET infrastructure, facilities, tools and instructor development. Its investment in infrastructure at the secondary school level has improved the image of TVET and the quality of TVET graduates. The building or retrofitting of TVET training facilities has increased access to relevant and current technical training programmes and improved the quality of TVET programming in these BMCs. In a small country like St. Vincent of the Grenadines, the impact of the infrastructure investment is significant. CDB funding reached virtually all technical training institutes in St. Vincent and the Grenadines. CDB is recognised as a key TVET development partner in St. Vincent and the Grenadines, St. Kitts and Nevis and Guyana in particular.

108. Nevertheless, sustained attention and efforts are required to address the 21st century challenges as outlined in section 3. While CDB's investment in TVET infrastructure at the secondary level has helped increase access and made an impact in noted countries, the same level of investment in TVET is needed at the college/tertiary level to ensure that the region has a sufficient pool of more highly skilled workers (Caribbean Vocational Qualification [CVQ] levels 3-5) to lead projects and create change. TVET institutions in SKN and SVG have provided post-secondary training and TVET projects in Haiti and Guyana support

⁶⁰ Development Effectiveness Review 2021 published June 13, 2022.

⁶¹ See section 4.4 on factors affecting performance.

⁶² The countries currently eligible to participate in BNTF include Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, St Lucia, St Vincent and the Grenadines and Surinam.

enhanced access to both secondary and post-secondary TVET programmes, but more investment in tertiary-level institutions is warranted. As noted in the context section, education systems in the region continue to favour 'academic' pathways to higher education over technical or vocational pathways. Students have fewer opportunities for technical education at the tertiary level compared academic education. Vocational education is seen as less desirable than academic education, which could contribute to imbalances in labour supply. Some stakeholders called for establishing scholarship programmes to attract strong students to technical education to improve its image. The region (and CDB) needs to pay more attention to STEM in education.

Finding 7: In the area of SEN, ETPS/CDB is beginning to foster inclusive access through investment projects, policy dialogue and technical inputs, research and advocacy. However, these products and services have been insufficient to make a sector-wide difference during the review period.

109. Access and equity issues related to SEN are gradually being introduced into the ETPS portfolio. For example, in 2020 CDB approved two regional projects with a dedicated focus on SEN. SEN components mentioned in project appraisals have focused on creating access for children with SEN through the provision of small-scale infrastructure (ramps), specialised equipment and assistive technology, as well as teacher training for differentiated instruction and curriculum adaptation. About 65% of projects pay some attention to SEN considerations in their design, although project appraisal documentation usually offers few details about capacity development to meet SEN objectives.

110. CDB has also supported development of national policies, strategies and sector plans aimed at creating more inclusive access to education and training systems. For example, CDB supported policy development related to SEN in Guyana and Antigua and Barbuda and funded research identifying constraints faced by vulnerable groups, including persons with disabilities (PWDs). CDB supported Assessment and Intervention Programmes for SEN Learners in Barbados and the OECS.

111. CDB also provided grant funding for the development of a Model SEN Policy and Strategy by UWI for BMCs. Based on consultations with OECS, CARICOM, UNICEF and other development partners, the regional project will conduct an in-depth review of what is currently being provided to address the educational needs of learners with SEN. It will develop a sector policy and strategy to address SEN, a standardised checklist for reporting, and a communications campaign to create interest in the model policy and strategy. Unfortunately, COVID-19 issues have delayed stakeholder consultations in the development of SEN policy at national levels.

112. To some stakeholders, the greatest needs in education are seen in the SEN sector. Many BMCs still need to establish a SEN policy and strategy (hence the investment in the model SEN policy and strategy). CDB has promoted design considerations in the form of policies, strategies and programmes that have targeted inclusive access and participation in education, but much more is needed to close the gap between design and implementation. CDB also supports training in diagnostic assessment and the procurement of diagnostic assessments for OECS countries through the SEN Diagnostic Centre at UWI, but most education systems in the OECS region cannot identify children with SEN. Teachers in many countries have received "general SEN training," but they are not equipped for dealing with special needs children in regular classrooms. Most education systems in the region lack SEN specialists (PhD level) to diagnose student needs, particularly of students with developmental challenges like autism. Countries lack specialised schools, facilities and equipment for children with SEN, including proper transportation to education facilities for

students with disabilities.⁶³ BMCs lack data on SEN, which limits their capacity to plan and resource SEN-related initiatives for more inclusive access. The infrastructure, equipment and skills required for addressing SEN is expensive and needs to be more prominent in project appraisals and plans. Indeed, 35% of ETPS projects (9 of 26) do not include SEN considerations in their design. CDB work in SEN areas is only beginning to address such challenges and it is still too early to see capacity change.

113. Most BMCs also need to expand and improve support services in education. Systems provide general counselling, but not clinical counselling, clinical psychologists or certified training for counsellors. There is further need for occupational therapists, speech therapists and other specialists that can support the varied kinds of special needs that are evident throughout the region. A project in Antigua and Barbuda provided psychosocial services for vulnerable students and their families, as well as teachers, but this seems the exception to the rule.

114. Some stakeholders made the case that taking care of the needs of teachers and students should be more prominent in the ETPS. In their view, an updated strategy should emphasise the retraining of teachers, providing opportunities for teachers' professional development in new areas and specialised fields like SEN.

Finding 8: ETPS/CDB support to teacher training and curriculum development has improved competencies, but education systems continue to face numerous critical challenges.

115. ETPS/CDB support to teacher training and professional development has improved teachers' competencies in BMCs. The ETPS portfolio includes teacher training focused on a range of competencies needed by BMC education systems and economies. Teachers and instructors at all levels have been trained. In 2021, for example, 756 teachers and principals (403 women) were trained or certified with SDF 10 financing⁶⁴ and 216 teachers (201 women) were trained under BNTF 9.⁶⁵ Teacher training has supported curriculum reform in basic education and TVET in BMCs. In SVG, for example, CDB supported the development of a technology education programme for TVET instructors. CDB has also helped improve teacher competencies through regional initiatives involving teacher training, such as Let's REAP which will train approximately 15,000 teachers in BMCs in its initial 3-year period. A key competency being acquired by teachers is the ability to provide inclusive and differentiated teaching and learning in the classroom.

116. Despite the ongoing efforts of teacher colleges, universities, ministries and development partners like CDB, teacher training and development in the region has yet to produce cadres of highly skilled professionals needed for SEN, STEM, TVET, and for the widespread use of ICTs in education and training. Teacher effectiveness and student learning has been constrained by teacher competencies, as well as missing equipment and support structures. Teachers may lack the skills needed for using ICT in teaching, but ICT infrastructure is not available in all schools. There is limited evidence of school principals playing a strong role in supporting teacher effectiveness and the use of SEN and ICT competencies in the ETPS portfolio.

117. High level technical expertise is limited among teachers and instructors. Education systems have not been able to produce the technical and vocational skills and knowledge needed by BMCs in part because these skills and abilities are missing in the system. CDB TVET projects in Grenada, St. Kitts and Nevis, St.

⁶³ CDB has made some investments in this area, such as the procurement of two buses with disability access for students travelling to technical institutes for TVET training.

⁶⁴ SDF Annual Report 2021, table 3.3

⁶⁵ SDF Annual Report 2021, page 15

Vincent and the Grenadines and Suriname train instructors in competency-based education and training (CBET) approaches, but more instructors with strong technical skills and the ability to use CBET approaches are needed at secondary and tertiary levels across the region.

118. Many TVET instructors have no experience in industry and lack the skills that industries need. Education systems, in particular educators, also need technical skills and knowledge in high value sectors such as STEM.

119. Stakeholders highlighted the need for providing more technical and pedagogical training to instructors. CDB could improve the sustainability of results if BMCs could quickly access funds to expand teacher development activities, particularly at the secondary school level.⁶⁶ This will enable TVET instructors, for example, to use the new tools and equipment more effectively to develop learner skills and to develop practical training and assessment approaches consistent with CBET. Gaps in the use of labour market-sensitive modalities have hindered demand-driven curriculum reform.

Finding 9: CDB has strengthened education sector policy and planning in the region, especially through development and training of networks and communities of practice and support to regional institutions. It has supported regional standards development, strategic management and leadership development at ministries of education and schools.

120. Strengthening capacity to reform and manage education systems for the purpose of enhancing student outcomes is one of three ETPS objectives. CDB has addressed the need for capacity change in education reform and management through the provision of products and services at national and regional levels. It has supported human resource development (HRD) for improved school and sector planning and management, including M&E, and educational reform, including in TVET, addressing SEN, GE priorities and the use of ICT in education and training. Capacity changes are seen in education planning and management, and in some areas of reform, but more is needed (in terms of time required, scale of effort, partners engagement and resources investment) to achieve ETPS plans for capacity change in education management and reform.

121. CDB/ETPS has aimed to address governance and leadership issues through a multi-level approach to capacity development for ministries and schools. As mentioned, 62% of investment projects and TA in the ETPS portfolio were designed to support ETPS objective 3. Table 4.1 highlights some of these initiatives.

Table 5.1 Education Governance and Management Initiatives

BMC INITIATIVES WITH GOVERNANCE AND MANAGEMENT TRAINING ACTIVITIES	REGIONAL INITIATIVES FOR EDUCATION GOVERNANCE AND MANAGEMENT
<ul style="list-style-type: none"> • Antigua and Barbuda – Learning Continuity and Resiliency • Antigua and Barbuda – TVET Framework for Certification • Grenada – GEEP II • Grenada – Assessment of TAMCC • Guyana – Hospitality and Tourism Training Institute 	<ul style="list-style-type: none"> • Preparation of the CARICOM HRD 2030 Strategy • Educational Leadership Conference for OECS Member States • Planning and M&E of SDG 4 goals/targets for BMCs • Model SEN Policy and Strategy for BMCs

⁶⁶ Other initiatives in the region provide pedagogical training, including in the OECS, using GPE and World Bank funding.

BMC INITIATIVES WITH GOVERNANCE AND MANAGEMENT TRAINING ACTIVITIES	REGIONAL INITIATIVES FOR EDUCATION GOVERNANCE AND MANAGEMENT
<ul style="list-style-type: none"> • Haiti – Quality Enhancement of Public Education • SKN – Learning Continuity • SVG – School Improvement 	<ul style="list-style-type: none"> • Gender Implementation Guidelines (GIG) for the Design and Implementation of Education Sector Development Plans • Strategic Plan for Caribbean Centre for Educational Planning, UWI • Caribbean New School Model (CNSM) Roadmap and Design for ECD and BE School Facilities • Development of the Basic Education Quality Management Framework (BEQMF) • Caribbean Early Childhood Development Good Practice Guide

122. CDB support to education management, particularly education planning, is ambitious and some projects are too early in their life cycle to expect capacity change. The investment project in Haiti, for example, strengthens planning and budgeting practices, community school management committees, EMIS, quality assurance and M&E. In Grenada and St. Vincent and the Grenadines, the projects train principals, management teams and community stakeholders in implementing school maintenance plans. Also in Grenada, school leaders are improving HR planning and management, quality management and financial viability in the TVET community college.

123. Let's REAP was launched in 2022 to train school principals and ministry officials across the region in school leadership, management and improvement for learning recovery and enhancement. Let's REAP was known to the majority of stakeholders consulted and was recognised as a key regional initiative by CDB, CARICOM, OECS Commission and other partners. Although the programme is still in its early stages, and interviewees were not able to comment on its contributions, it was welcomed across the region as a key initiative to support education stakeholders at different levels in navigating the context created by the pandemic. It is seen as a flagship initiative to connect schools and teachers across BMCs by creating opportunities for networking and collaboration. It is also considered a good example of CDB building on a successful OECS initiative and helping to bring it to a larger scale.

Let's REAP highlights that leadership is not just about administration but also about motivation and innovation. Let's REAP has the potential to provide standards and remind leaders on how to navigate the current situation. – BMC stakeholder

The Let's REAP project with CARICOM for building capacity of school leaders and teachers has been very helpful. It has created opportunity for meetings, networking, and offers a framework for training, document sharing. – BMC stakeholder

Let's REAP is a regional programme across CARICOM states. With COVID, there has been learning loss and even before that there were some challenges in the education sector. I am glad that Let's REAP training is happening as leadership in schools is lacking. Principals and senior teachers will get exposure around modern ways of leadership and assessment. – Regional stakeholder

124. CDB has supported the development of national policies, strategies and sector plans in various BMCs. In Guyana and Antigua and Barbuda, for example, CDB supported policy development for TVET, post-secondary education and SEN. CDB has also funded the development of a SEN model policy and strategy through a regional initiative with UWI (see Finding 7). It supported capacity development for sector planning and management in ministries and public agencies in Grenada and Haiti and through regional initiatives. CDB provided institutional capacity building of national and regional entities including in Antigua

and Barbuda, Guyana and Grenada for TVET, and in UWI with various initiatives including the UWI digital transformation project, UWI TV, UWI sports faculty development and strategic planning of the Caribbean Centre for Educational Planning (CCEP).

125. CDB support to BMC capacity change for policy development and sector planning has encountered constraining issues. The ability of education ministries across the region to absorb and sustain capacity changes is limited in some cases by inadequate resourcing strategies, poorly equipped planning units, staff shortages and turnover, weak M&E systems, limited stakeholder engagement and short-term thinking. The development of policy, strategies and plans has resulted in good programme design, but resourcing for implementation is a concern. These issues are examined further as factors affecting ETPS results in section 4.4.

126. **Education Sector Planning.** Some regional and BMC stakeholders cited CDB work to strengthen education planners in the region as being noteworthy. In 2018, with CDB support, CARICOM helped to establish a network of education planners called the Regional Network of Planning Officers (RNPO). The RNPO is a community of practitioners exchanging knowledge and best practices among planners. The network of planners has played a strong role in benchmarking and M&E initiatives linked to the CARICOM HRD 2030 strategy.⁶⁷ Stakeholders reported that RNPO members have improved planning capacity in education ministries in their BMCs. More recently, CDB supported the provision of education planning training for non-OECS BMCs through the International Institute for Education Planning (IIEP). These trainings have introduced Gender Implementation Guidelines as part of the education planning agenda.

127. CDB has also supported institutional strengthening for the professional development of education planners. In 2013, CDB started working with UNESCO to develop what became the Caribbean Centre for Educational Planning (CCEP) housed at UWI. In 2021, CDB financed the preparation of a strategic plan for the CCEP to address the needs of education planners for professional development through a training centre. In the review, some education planners expressed the view that CCEP has not yet met this need. The investment has encountered challenges, while resource limitations and other factors may have constrained the training centre.

Finding 10: CDB contributions to the system-wide development of the TVET sector has resulted in an improved institutional framework, stronger TVET institutes and better instructors and programmes. However, the TVET sector in the region has numerous unmet development needs.

128. CDB has contributed to institutional development of the TVET sector for improved sector planning and management in support of CSME objectives. It has helped the CXC to develop Caribbean Vocational Qualifications (CVQs) and National Vocational Qualifications (NVQs) for use by BMCs. The portability of CVQs is a key aspect of broadening the supply of labour forces in BMCs. With CDB support, CXC has sought to improve its services and products to address “labour disengagement” (i.e. people leaving the education system without acquiring the “right” skills set) and access issues caused by the qualifications

⁶⁷ CDB supported the development and implementation of the CARICOM HRD strategy. The ETPS and HRD strategy share similar objectives for increasing access, participation, equity, relevance and effectiveness in education systems, seeing governance and efficiencies as enablers.

framework. Male students reportedly prefer shorter certification periods and want more flexibility in accessing credentials and certification through life-long learning systems. Improving the CVQ framework would address access issues related to gender, age and SEN.

129. TVET provides a good example of coordination efforts in the sector, as well as governance issues slowing the development of TVET systems in the region. As mentioned, CDB is recognised throughout the region as a major stakeholder in the transition of TVET from a stigmatised second-chance training destination to a major developer of required skilled workers. CDB is seen to have a solid understanding of the region and regional education systems. At operational levels, respondents in BMCs consulted report a good working relationship with CDB, and they value the flexibility and responsiveness of CDB staff when working out issues affecting project timelines and finances.

130. However, governance issues in the TVET sector have slowed the development of TVET systems in the region. TVET projects in St. Kitts and Nevis and elsewhere support the articulation of TVET in national systems, but there is still fragmentation of TVET systems at tertiary level (technical universities, vocational colleges, STEM) in BMCs. The effectiveness of some ETPS initiatives has been affected by the absence of national training agencies (NTAs) in some BMCs⁶⁸ or their position within ministerial reporting structures. NTAs that are closely engaged in projects and decision-making report the greatest progress towards achieving results.

131. At the level of industry sectors, CDB's contribution to Tourism and Hospitality training in the region is well-known and appreciated. But COVID-19 helped to highlight the need to diversify the economy and emerging industries, such as the oil and gas sector in Suriname and Guyana, require trained, skilled workers now. In Suriname, the NTA was not aware of CDB's contributions to the national TVET initiatives.

132. TVET governance is well-established in some BMCs, but stakeholders voiced the need for continued support to the development of national TVET policies. Some regional stakeholders suggested that long-term funding programmes, such as the employer levy used in Jamaica, would lead to more sustainable and higher quality training systems. CDB has already supported such an initiative in Grenada, with funding used to establish an enterprise training fund, and this kind of project could be replicated. Engaging the private sector more deeply in project activities or implementation could help to strengthen linkages between employers and training institutions and increase the labour-market relevance of TVET programming.

133. The regional TVET system would be stronger if all countries were awarding the CVQ. CDB's continued investment to help establish NTAs and CVQ systems could help individual countries as well as the region's workforce. Several BMCs have developed national TVET policies but need support for implementation. This support would also strengthen the regional CVQ system. At this point, BMCs and regional partners are unable to align TVET systems with labour market needs. Further, labour market needs are uncertain and bound to change over time.

134. CDB is a critical development partner on the ground for TVET, supporting its system-wide development. With CDB support, the TVET sector has stronger institutes and better instructors and programmes. However, the sector has numerous unmet development needs:

⁶⁸ Most OECS countries are trying to strengthen TVET councils to become NTAs – with the notable exception of Grenada which has a well-established NTA.

- CVQs are needed in more skills areas and more BMCs need to adopt and use the CVQ framework.
- The Caribbean Association of National Training Agencies (CANTA) needs to play a strategic role engaging key partners such as chambers of commerce in TVET development.
- NTAs need a voice more independent of ministries in some BMCs.
- The region needs to reduce competition among TVET institutes and make TVET programmes more complementary.
- Stakeholders need to address the stigma around TVET in the region and advocate for skills training to support economic growth.

Finding 11: CDB actively collaborates and coordinates with other key actors in the sector, but many sector-wide governance issues, critical for sector reform, have not been fully addressed despite such collaboration.

135. The ETPS outlines CDB's strategic thinking, approach and role in development partner coordination, private sector collaboration, and assistance to BMCs. For example, the ETPS identifies these types of approaches to coordination and collaboration with partners:

- Seek co-financing arrangements with development partners for projects and programmes
- Strengthen partnerships to avoid duplication and maximise development assistance
- Cooperate with partners in areas such as sector analysis, policy design and programme implementation
- Carry out and share research on regional problems, providing solutions to regional challenges and issues
- Work through established entities to achieve outcomes
- Strengthen private sector collaboration and pursue private sector participation at post-secondary level and TVET
- Provide project preparation assistance (PPA) to BMCs to improve interventions
- Ensure stakeholder consultation and participation to promote ownership and consensus
- Support direct cooperation among BMCs and other entities for learning
- Support study visits, exchanges and participation in global education forums to learn best practices.

136. CDB's role in development partner coordination and collaboration is seen in the elaboration of these approaches. CDB is an investment partner, facilitator of learning, convenor of stakeholders, consultant and technical specialist. The concerns, roles and approaches for development partner coordination and collaboration described in the ETPS are largely consistent with those in the 2004 education strategy.

137. **Investment partner.** CDB has developed formal co-financing arrangements with other IFIs and international partners, such as IDB in the OECS, UNESCO in the CCEP, and the GPE. With IDB, the arrangement helped the IFIs to respond more quickly and effectively to pandemic conditions in OECS countries. CDB's overall alignment with GPE priorities for GE and inclusion has helped CDB play its formal role as coordinating agent for GPE grants for the OECS. In Haiti, CDB has not been active in policy dialogue, likely because other IFIs (World Bank and IDB) have large projects in the country CDB financing was

channelled through World Bank programmes,⁶⁹ and the donor landscape in Haiti makes coordination more challenging. CDB was an investment partner in 14 regional projects in the ETPS portfolio being implemented with or by the CARICOM Secretariat, OECS Commission, UWI, CXC, and other institutions. CDB and its investment partners have worked together effectively in these initiatives and the outcomes of some projects – for example, to develop the CARICOM HRD 2030 Strategy or the CVQ certification system – have shaped further coordination and investment in development in the sector. Let's REAP will provide opportunities for scaling up capacity development, particularly if investment partners can address resource constraints.

138. **Facilitator of learning.** CDB has played a role facilitating learning in regional and national contexts. In the area of SEN, for example, CDB in partnership with the Joint Board of Teacher Education (JBTE) at UWI, Mona Campus, supported a regional virtual forum for dissemination of SEN assessment best practices, intervention planning, and learner engagement. CDB also facilitated SEN-related study tours of BMCs in the region and supported the development of a model SEN policy and strategy for BMCs. In some countries like Guyana, CDB has supported local education groups (LEG) and facilitated access to research, knowledge and best practices on priority issues such as GE. CDB has provided input on reforms and other activities in Guyana through the ministry-led LEG, but its focus is more on the TVET sub-sector than say primary education where the World Bank has a large project. Numerous stakeholders see having local knowledge as CDB's comparative strength. In general, stakeholders appreciate CDB's role as facilitator of learning in the education sector, although some stakeholders said CDB could play a bigger, more strategic role as facilitator of learning by encouraging research on priority issues and making more data and analysis available in friendly formats on, for example, labour market trends.

139. **Convenor.** CDB's capacity to play the role of convenor in the education sector is recognised as a comparative strength. Education stakeholders listen to and respect CDB, and CDB can get stakeholders to the table. CDB has played this role in regional projects to establish a Regional Partners and Donors Coordination Advisory Committee to ensure synergy and accountability in the delivery of SDG4 – Education 2030 Agenda in the Caribbean Region, and to revitalise the RNPO as a community of practitioners.

140. **Consultation role.** Stakeholders recognise that CDB consults extensively with project stakeholders in BMCs, including communities, during the preparation and design of education projects. This type of consultation is valued and beneficial to BMCs. In Grenada, for example, BMC stakeholders identified CDB consultations with local stakeholders as CDB's comparative strength. CDB consults “in all stages of the project, with communities, with engineers. CDB listens well and has a lot of patience.”⁷⁰ BNTF projects have community liaison officers tasked with ensuring grassroots level consultation throughout the project cycle, while social analysts support a similar process in SSD projects. However, CDB is seen by some BMC stakeholders to consult primarily with BMC governments and only indirectly with “grass roots” organisations such as teacher unions, principals and representatives of marginalised groups and communities, while preparing and guiding projects. This suggests the need to ensure better visibility of CDB's top-down and bottom-up consultative processes in BMCs.

141. **Technical specialist.** CDB has provided technical expertise to BMCs linked to investment projects in education at least since the 2004 strategy. It has used different modalities including PPA and specialist TA in areas such as gender or M&E.

⁶⁹ CDB financing was channeled through the World Bank until June 2021

⁷⁰ BMC stakeholder in Grenada.

142. Generally, CDB has played these coordination roles effectively. Stakeholders were most positive about CDB as investment partner, facilitator of learning and provider of technical expertise. However, many sector-wide governance issues have not been addressed despite such collaboration. CDB's strategic role and value-added in the coordination of stakeholders and investment in the education sector is not well defined in the ETPS. Some regional stakeholders have suggested the need for more clarity on its strategic role, particularly with regards to addressing sector-wide governance issues.

Finding 12: ETPS support to improved M&E and evidence-based decision making made only limited progress and remains a critical priority for BMCs and regional partners. With system-wide needs and challenges, and other programmes active in this area, CDB's role and value-added in M&E capacity change is not clear.

143. In the ETPS, CDB acknowledges that performance measurement challenges abound in education sectors in the region, while promising to build and strengthen a results-based M&E culture in BMCs and the capacity to sustain M&E systems. It states that it will develop BMC capacity for collecting, analysing and establishing baseline data and performance indicators, and reporting and use of findings.⁷¹ Further, the ETPS includes a summary framework that includes 26 indicators for measuring its implementation and progress toward the achievement of its objectives. In its entirety, this is an ambitious agenda for the development and use of M&E in education sectors, as compared to CDB intentions outlined in the 2004 ETPS.⁷²

144. In the ETPS, CDB has supported various capacity building initiatives for improved data gathering, analysis and management in the education sector and systems. For example, CDB has supported four regional initiatives and one national initiative in Haiti to improve data management through the development of EMIS, preparation of M&E frameworks for tracking results, and the alignment of indicators. In addition, CDB has provided project cycle management training to BMCs, and regional training for planners in M&E and EMIS, as a foundation for evidence-based decision making. BMC members of the Regional Network of Planning Officers (RNPO) helped to establish baseline data for the Regional Action Plan (RAP) for phase 1 of CARICOM HRD strategy. They monitor a framework of 27 indicators mostly at the national level but also at the regional level for education sector governance. In 2019, the RNPO produced a 'Readiness for Action' report on these indicators, identifying the weaknesses and opportunities in ministries of education. The monitoring report was shared with the Council for Human and Social Development (COHSOD) in Oct 2022, along with plans for phase 2 benchmarking and targets. CDB provided TA to produce the report.

145. CDB has supported capacity development for schools and leaders to improve M&E in the sector. Stakeholders report increased M&E capacity in planning units now through training and the provision of more staff. BMCs can report on about 75 percent of indicators in the Regional Action Plan (RAP) framework. They have more capacity to design and implement M&E for timely and valid data generation and for policy makers to use the M&E data in sector planning. RNPO benchmarking is strategically aligned with UNESCO framework.

⁷¹ ETPS, p. viii, p.28 and p.31.

⁷² The 2004 ETPS referred to the need for "standards, accountability, transparency, and reliable data... needed to evaluate the performance of the system, and for engagement in evidence-based decision making." (p. vii) However, the 2017 ETPS pays greater attention to the RBM systems and tools in education. See for instance, ETPS section "monitoring and evaluation" (paragraphs 4.24 to 4.27).

146. Despite CDB contributions, CDB was challenged to produce results and lasting capacity change in key areas of monitoring and evidence gathering and use across all three ETPS objectives. The challenges to capacity change in the M&E of education systems include:

- Limited data collection taking place – primarily descriptive data collected and reported on (e.g., student enrolment); lacking robust analysis and data on performance; in several countries archaic paper-driven data collection methods are still the norm.
- There is no culture of M&E such as the systematic collection and analysis of information to assess the education ecosystem and the use of data to inform decision making
- Lack of human resources with substantial professional training and/or experience in M&E. Training provided tends to be foundational and or project-specific. Capacity issues around human resources include limited number of available personnel due to small departments, lack of locally trained personnel – quantity and quality of the resources. In cases where data is being collected, using it to inform policy is affected by lack of trained data analysts.
- Lack of other resources:
 - Central monitoring and reporting systems/M&E systems are lacking or outdated; electronic data collection systems are often limited to individual Excel files (e.g., Excel and Access based) and/or systems that don't talk to each other. EMIS was mentioned by several countries but few, if any, have fully implemented this system.
 - Funding or technical capacity on how to access available funding is limited; limited financing has been earmarked or available for data systems/M&E in national budgets (not given priority so not budgeted for)
 - Infrastructure - computers, internet, bandwidth – which was brought to the fore by the COVID-19 pandemic
- Issues around data security and confidentiality hinder the development of data systems, despite the fact that mechanisms to address such issues are well developed in the IT field.
- Lack of political will – M&E is not budgeted for or demanded for decision making; primarily tied to funding deliverables.
- Lack of data/evidence – Lack of data to inform policy at national and institutional levels (e.g., Haiti tertiary education institution). There is considerable investment in implementation of programmes and projects, but less investment in evidence gathering. Further, research centres in the region are not yet being tapped into by BMCs, although CDB support to the UWI Caribbean Education Research Centre, which was launched in November 2022, is aimed at closing this gap. The Centre prepared the first Let's REAP report at the end of 2022.

147. Weaknesses in the collection and reporting of M&E data impact the integrity of BMC reporting and prevent BMCs and their partners from engaging in strategic, evidence-based policy dialogue especially as related to access and equity for large segments of their populations. Without quality data, M&E cannot support accountability, transparency and learning to give support to strategic policy direction.

Labour market information for TVET planning and management is missing. BMCs suffer from shortcomings in the production and use of labour market information, including by education systems. Linkages between TVET systems and labour markets have been hard to establish and there are mismatches between labour market needs in BMCs and available training programmes. BMC stakeholders described instances of TVET systems not responding to industry needs for technical and vocation skills in CARICOM economies, e.g., oil and gas sectors in Surinam and Guyana. In some countries, chambers of commerce are not consulting with the TVET sector about their needs or to prioritise which skills areas can be addressed by training institutions with limited space, equipment, and instructor expertise. As a result, TVET institutions cannot share information with young people about work opportunities through TVET programmes. They lack data on salaries that trades people earn, for example. This information could be used in schools for career guidance. Institutions lack sufficient capacity for data sharing and dissemination via social media. Stakeholders are aware of CDB financial contributions in TVET development. However, most are not aware of CDB's non-financial supports in this area, except for the helpfulness of the CDB TVET experts when they make in-country visits. With improvements needed in the governance of TVET, CDB's advocacy, technical assistance, coordinating function, and research and information sharing needs a strategic purpose for its contributions.

148. Other donor partner programmes in the region deliver M&E capacity building to education sector stakeholders. These include the World Bank Independent Evaluation Group/CARICOM regional project; a UWI training initiative, and M&E training under CARICOM 2030. Given the increasing need for e-based M&E as a 21st century competency in education systems, the profile of M&E in the ETPS, and the challenges to progress and results achievement so far, CDB could ask: Is M&E capacity building at BMC level or project level a priority for ETPS? If yes – given the involvement of other donor partners, what is CDB's role?

5.4 Factors Affecting ETPS Performance

149. The following findings outline the main factors affecting the performance of the ETPS over the review period. These include facilitating and hindering exogenous factors in global, regional, national, and institutional contexts (EQ 3.1) and CDB internal capacity and systems (EQ 3.2). This section also explores the extent to which CDB has leveraged its reputation and strategic role in the education and training sector (EQ 3.3).

Finding 13: CDB performance has been adversely affected by exogenous factors that are common across sectors as well as those specific to the education and training sector.

Document review and stakeholder interviews highlighted exogenous factors that have affected CDB's work in the region. Some are well known and affect CDB's work across sectors and others are specific to the education sector.

Across sectors

150. One of the most common factors across sectors is national disasters and emergencies, such as hurricanes impacting multiple BMCs, the volcano eruption in St. Vincent and the Grenadines and the COVID-19 pandemic. These events caused delays in or halted the implementation of initiatives, required adjustments to the design and scope of projects and, in some cases, led to the reallocation of resources towards new priorities and more imminent needs. In addition, Haiti is a special case as the only fragile state among

CDB BMCs and experienced multiple shocks over the review period, including political instability, civil unrest and the 2021 earthquake. As a result, in-depth data collection in Haiti for this review was not possible given the limited accessibility of stakeholders in the country.

151. Cyclical political changes in BMCs are another key factor mentioned by stakeholders; these tend to cause disruptions to the policy agenda and education programming due to changes in governments and management. One government stakeholder pointed out that the civil service is often not set to ensure continuity in policy priorities. In addition, the implementation period for most of CDB's investment projects, including in the education and training sector, ranges from seven to nine years (including extensions)⁷³ and often spans multiple governments.

152. A third common factor is the institutional and implementation capacity in BMCs. This has been highlighted in SDF reports as one of the main causes for low levels of CDB loan and grant disbursements. A critical dimension of BMC capacity is human resources and local expertise, and 7 out of 19 BMCs explicitly mentioned shortage of qualified personnel, staff turnover, challenges with recruitment and high workload for staff as common challenges. Other dimensions relate to supply issues, especially when resources need to be imported, and the quality of contractors. On the latter, some respondents noted that contractors are not always selected based on the quality of their work but on their familiarity with tender requirements, and that more local contractors' need to strengthen their knowledge of procurement processes.

In the education sector

153. In the education sector, there are also specific factors that affect/limit potential for greater effects of CDB support for the sector. First, stakeholders pointed out that the education cycle, which is based on the academic school year, is not necessarily aligned with fiscal, project or contracting cycles. For instance, school infrastructure projects often face pressure to be finalized by the start of the new school year.

154. Second, stakeholders described the governance structure for certain education sub-sectors as being fragmented or siloed. In BMCs, education is often not a "one ministry affair" but involves multiple entities requiring greater coordination and collaboration. For instance, some BMCs noted that responsibilities for SEN are fragmented across different ministries and departments and that limited sharing of SEN-related data has resulted in duplication of efforts and frustration among key population groups. In ECE, the private sector is a key education provider in many BMCs, with some countries being further along in efforts to enhance regulations, standards, availability, and access to data. In the TVET sector, ensuring the autonomy and financing of NTAs is a challenge. Overall, stakeholders noted the need for greater collaboration, alignment, and cooperation between entities both within countries and across the region and the need to better manage so-called "turf-ism", duplication, and diverging political agendas.

⁷³ CDB. *Annual Review of the Performance of the Portfolio of Projects/Loans under Implementation for the Year Ended December 31, 2021*. Paper BD 49/22. June 13, 2022. Data disaggregated by sector was not provided in the report.

155. Third, stakeholders shared that the education sector faces funding challenges stemming from limited access to funding sources and financing arrangements within governments. The 2022 UNESCO regional monitoring report notes that education expenditure as a percentage of total public expenditure decreased overall in the Caribbean between 2016 and 2019.⁷⁴ BMCs mentioned financing education as a challenge due to reduced access to international aid as countries graduate to middle-income status, economic and fiscal constraints exacerbated by external shocks, and at times ministries' limited knowledge around budgeting for policy implementation.

“UNESCO provides a lot of guidance documents and strategies but support for implementation, especially financial resources, is lacking.” – BMC stakeholder

“In terms of sector planning, there is a capacity gap around resources provision and the budgetary estimates not just in [BMC] but across the region.” – BMC stakeholder

156. As noted in section 4.3, key shortcomings were reported around BMC capacity for monitoring and evaluation:

- BMCs have paper-based M&E systems, collect mostly descriptive data, lack analysis
- Gaps in data sets, including data on labour market needs
- M&E systems are missing diagnostic/assessment tools
- Insufficient HR expertise and resources, few trained data analysts
- Limited financing earmarked for M&E systems
- Limited enabling infrastructure (computers, internet, bandwidth)
- Management culture doesn't 'demand' M&E for learning, analysis or decision making
- Political culture doesn't budget for M&E.

⁷⁴ UNESCO, UNICEF, ECLAC. *Education in Latin America and the Caribbean at a crossroads – Regional monitoring report SDG4 – Education 2030*. 2022. The report shows a reduction in education expenditure as a proportion of total public expenditure over the period 2015-2019 for Jamaica, Guyana, Saint Lucia, British Virgin Islands, Turks and Caicos Islands, Anguilla, Bahamas, Barbados, Dominica and Montserrat. The following countries recorded an increase: Belize, Suriname, Haiti, Trinidad and Tobago, Antigua and Barbuda.

Finding 14: CDB has made efforts to address factors that hinder ETPS performance. However, there remain areas for improvement, in particular in responding to emergencies, developing capacity to generate and use evidence, and greater coordination among stakeholders.

157. CDB has made notable efforts to address factors that hinder ETPS performance. BMCs limited institutional and implementation capacity remains a key challenge in the region. CDB recognizes this challenge in its strategic planning, including the ETPS. It has conducted regional training initiatives (PPAM/PCM),⁷⁵ including with key partners (IIEP), that are appreciated by government stakeholders in BMCs. In addition, CDB projects sometimes allocate funds for consultancies to support project management. Government stakeholders in BMCs expressed mixed views about the use of consultants. On the one hand, they note that outsourcing to consultants is not always conducive to strengthening local capacity; on the other hand, governments often need to draw on external expertise for policy development and planning activities due to limited knowledge of standards and best practices. Stakeholders in BMCs highlighted the advisory function of CDB staff, providing support for project management and supervision and engaging in collaborative development of solutions. In 2018, CDB opened an office in Haiti, its first outside of CDB Headquarters in Barbados.⁷⁶ The office has provided additional support for project implementation and supervision and is a positive evolution in CDB engagement with BMCs.

“At the launch of the CDB-funded project, the Bank organized a workshop for all project management officers on CDB projects and took through all stages of project management on how to tackle different issues including procurement. Individuals were encouraged to access free courses on the CDB website around the requirements and processes of CDB. These trainings have been helpful.” – BMC government stakeholder

158. As outlined in Findings 12 and 13, funding for the education sector is a key concern in the region. CDB is viewed as a key funder for education in the region, in both geographical coverage and the level of funding. In particular, BMCs’ access to concessional funds through the SDF and BNTF is welcomed given the limited fiscal space for BMCs and overall constraints for education finance. Not all countries in the region are eligible for other sources of finance, including from the GPE. CDB has also become a vehicle for other entities (IDB, EU) to channel resources to the region by administering funding mechanisms such as the IDB Covid-19 OECS Line of Credit⁷⁷ and the Economic Partnership Agreement (EPA) and CSME Standby Facility. Furthermore, CDB has been in talks with the GPE to mobilise additional resources for the education sector and to activate the GPE multiplier.⁷⁸

159. The region’s vulnerability to natural disasters and emergencies continues to be a core challenge. In response to COVID-19, CDB has driven or supported innovative initiatives to address the effects of the

⁷⁵ Public Policy Analysis and Management and Project Cycle Management (PPAM/PCM) is a public sector training initiative which launched in 2016 and was completed in 2019. It is the largest in-person public sector training programme that CDB has ever carried out.

⁷⁶ <https://www.caribank.org/newsroom/news-and-events/cdb-officially-opens-office-haiti>

⁷⁷ For instance, the IDB Covid-19 OECS Line of Credit has helped fund the Enhancing Learning Continuity and Resiliency project in Antigua and Barbuda and the Enhancing Learning Continuity Project in St. Kitts and Nevis in response to the COVID-19 pandemic. EPA and CSME Standby Facility

⁷⁸ The GPE Multiplier is a finance instrument that provides an incentive and the financial resources to catalyze more investment in education. Countries can access 1\$ of GPE multiplier grant for every 3\$ in MDB grants and loans.

pandemic, including the Let's REAP initiative and a greater focus on digitalisation. CDB has also emphasised the need for more climate and disaster resilient infrastructure, including through its education portfolio. However, some BMCs criticized the slow response rate of CDB in emergencies, especially in terms of funding approvals and disbursements. CDB staff also acknowledged limited experience in supporting fragile and conflict affected states, such as Haiti.

160. CDB has been recognised for its collaboration and coordination efforts with key partners in the region given fragmentation and siloes described in Finding 13. Stakeholders highlighted that CDB has good working relationships with BMC governments and with the CARICOM Secretariat, OECS Commission, IIEP, IDB, GPE and other partners, seeking greater alignment both at regional and country levels. For instance, in Guyana, IDB and CDB are part of the Local Education Group and have worked together to support the government in assessing GPE grants. CDB has also played the Coordinating Agency role for GPE-funded interventions in the OECS. However, stakeholders also noted that the degree of coordination varies by country and that greater efforts are required to avoid duplication and create synergies. Non-government stakeholders in BMCs, including teachers' unions, principals, and national TVET entities, expressed the desire for CDB to work more directly with them.

Addressing M&E challenges

161. CDB has been providing support for M&E on a project-by-project basis. CDB staff are expected to review the results framework and provide training (if required) at the beginning of capital projects, for instance via a Project Launch Workshop.⁷⁹ Most projects reviewed included some elements to support M&E capacity, either by engaging an M&E specialist, adopting measures for strengthening information management systems, conducting institutional appraisals, baseline, mid-term studies or final evaluations, or implementing training activities for project implementation and/or government staff. In addition, CDB staff report providing ongoing support to their BMC counterparts, including project coordinators, project implementation units and M&E officers.

162. CDB has provided support to BMCs to increase awareness, knowledge, and skills for managing for development results (MfDR) through various initiatives. Initiatives included: training in BMCs, informational seminars and annual orientation programmes for Board members, TA for strengthening BMCs' statistics infrastructure, support and guidance to implementing agencies. See section 4.3, Finding 9.

Finding 15: Stakeholders consider CDB's comparative strength in the education sector to stem from its familiarity with and presence in the region; its relationships with and ability to convene a broad set of stakeholders; its advisory role and consultative approach. CDB could increase its visibility in the region.

163. Stakeholders consulted highlighted several comparative strengths of CDB. First, its familiarity with knowledge of and presence in the Caribbean enable the Bank to provide tailored support to the education and training sector. Its knowledge of key education stakeholders and local systems and its participation in regional activities and events ensures that the Bank's work remains relevant.

⁷⁹ According to CDB's Operational Manual, a Project Launch Workshop is organised by CDB supervision staff "to ensure that project management, and staff and other relevant staff of the Borrower/EA, fully understand the project design and implementation procedures and that they have allocated enough time to adequately plan project implementation."

164. Second, government stakeholders in BMCs appreciate the accessibility of CDB staff, noting that they have built trusting and, in some cases, long-term relationships with CDB. CDB nurtures these relationships through regular outreach to countries and in-country visits. It also provides valuable training and support for policy-making and education sector planning, often in collaboration with other partners in the region.

165. Third, CDB is valued for its emphasis on listening and not pushing its own agenda. This is exemplified in its engagement with ministries of education to help them define their priorities and needs. Several appraisals of projects in BMCs also mentioned consultations with different stakeholders during the design of the project. Some BMC stakeholders also shared examples of CDB's flexibility in adjusting to BMC needs and making changes to projects, such as in the context of the pandemic.

166. All of these strengths combined provide CDB a certain leverage in the region. It is recognised for its ability to convene different actors due to its relationships with BMCs and regional stakeholders, such as around key policy issues (e.g., SEN, GE in education). It is also recognised for its ability to pilot or scale up innovative initiatives (e.g., Let's REAP) and draw on good practices.

167. Despite its comparative strengths, CDB's support to the education sector is not always visible across the region or across different types of stakeholders. As mentioned under Finding 14, there is room to strengthen CDB's public relations and communication efforts and direct engagement with non-government stakeholders, including teachers' unions and principals.

“CDB listens well...there were delays in the start-up [to the project] because the CDB was listening and making modifications based on what they were hearing. They are listening to what the community is saying. CDB consults in all stages of the project, with community, with engineers.” – BMC government stakeholder

“They do country visits, they ask borrowers to demonstrate the need, they talk to stakeholders about needs, they prepare documents that are very helpful to us guiding the grants. Most donors do assessments on paper, whereas CDB goes to the country and talks to people on the ground.” – BMC government stakeholder

“CDB doesn't try to push their agenda, impose their priorities as much as some other donors do. They listen well to Member States and they try to accommodate things we really like.” – BMC government stakeholder

“CDB has a respect for what the country wants to prioritize -we have never been told what the country needs to do” – BMC government stakeholder

Finding 16: CDB's strength in the sector stems from its knowledgeable and well-respected education team. However, the Bank's ability to respond to exogenous factors and perform in the sector is affected by internal capacity constraints around human resources, grant and loan management processes and results tracking.

168. While CDB has several comparative strengths enabling its work in the education and training sector, some internal capacity constraints limit its ability to respond to exogenous factors and perform in the sector. Key constraints are its human resource capacity, its grant and loan management processes and its capacity for results tracking. The latter two have also been recognised as challenges for CDB's work in other sectors, beyond education.

169. CDB's operations in the education and training sector are led by the education team in the SSD, which also provides substantive technical inputs to various Bank and regional initiatives in the sector. The team is small, consisting of two staff members, and a consultant that functions as another full-time member

of the team. Team members wear multiple hats (from technical advisors to project supervisors to partnership managers) and cover a large number of thematic areas requiring breadth and depth of knowledge across education sub-sectors. Stakeholders in the region described the team as highly knowledgeable of the sector and the region, accessible and well-respected among their peers. The education team liaises with other departments, including with Country Economists who oversee the development Country Engagement Strategies, the Coordinator for CDB regional programming, in particular on CDB's work in the area of TVET, and CDB's gender specialists who support the Bank's gender-dedicated and mainstreaming work in the sector. One stakeholder pointed out CDB's lack of a human resource strategy as an underlying challenge. A clearer direction for CDB's approach to staffing was mentioned as a possible consideration for CDB moving forward. Lastly, CDB does not have a presence in BMCs, with the exception of Haiti, which was sometimes mentioned as a value added of other actors, such as the IDB. Past efforts to put in place resident implementation officers have not yet played out as originally envisaged.

170. BMCs provided mixed feedback on CDB grant and loan management processes. While they appreciate CDB's flexibility, they also noted challenges around the timely response to BMC requests, the processing of payments, and lengthy funding approval processes. These challenges are not limited to education and training projects but concern CDB's portfolio of projects across sectors. For instance, the Annual Review of the Portfolio of Projects/Loans under Implementation shows that the average time from appraisal mission to approval for loans, grants and policy-based loans increased from 101 days in 2018 to 199 days in 2021.⁸⁰ Some BMCs also noted that CDB's procurement guidelines are not always easy to navigate, which hinders local contractors' ability to submit successful bids. These types of concerns from BMCs have been noted in previous evaluations⁸¹ and CDB is well aware of them. Over the review period, CDB made efforts to improve its internal grant and loan management processes. It commissioned an "Operations Process Review" to assess the state of project management and propose improvements to systems and processes. In 2019, CDB updated its procurement policy and procedures for projects. These reform initiatives are ongoing and will require continued commitment from CDB staff.

171. Lastly, as mentioned under Finding 12, CDB has not systematically measured progress towards ETPS objectives. While the ETPS provides a partial results framework, CDB did not have systems and processes in place over the review period for proper measurement and reporting. Results tracking for the education and training sector mainly occurs for the corporate results measurement framework (Level 1 and 2 indicators), published in CDB's annual reports, the reporting on SDF, and at the project level, through project supervision and completion reports. Project-level reporting was not

There is a lot of work that the Bank is doing that is not captured which is unfortunate. What are the results of the Bank's activities? Its influence is not properly captured. As a strong supporter of evaluation, I believe that there are weaknesses around RBM [results-based management] and defining results. – CDB stakeholder

available for this review to assess the quality of results data, yet previous assessments, such as the 2021 Review of CDB's approach to Management for Development Results, suggest that project-level results are

⁸⁰ CDB. *Annual Review of the Performance of the Portfolio of Projects/Loans under Implementation for the Year Ended December 31, 2021*. Paper BD 49/22. June 13, 2022. Data disaggregated by sector was not provided in the report.

⁸¹ 2019 Country Strategy Cluster Evaluation

not consistently tracked during implementation and remain largely at activity and output levels. CDB has recently started to produce country strategy completion reports, which provide results information against the results framework of a small number of country strategies. CDB is now shifting its systems to OP365, which aims to improve monitoring activities across the Bank. It remains to be seen if these efforts will result in greater use of results data for learning and decision making.

6 Conclusions, Lessons and Recommendations

6.1 Conclusions

172. This review takes place at a time in which education systems in the Caribbean are facing critical challenges in addressing issues of access, quality, equity and governance, and are also trying to address learning losses due to COVID-19. This section presents conclusions based on the evidence and findings cited above. It attempts to provide insights that will inform future work in the education and training sector.

Conclusion 1: As a funder, CDB has made essential contributions, especially to improved school infrastructure in select BMCs. It has also been able to leverage additional financial resources for education and training. [Findings 5, 6, 14]

173. CDB has made significant financial contributions (with a portfolio of approximately USD64.3 mn) but is not the primary education sector funder in most BMCs. The BNTF has consistently allocated the majority of its grant resources to the sector and is recognised for having a tangible effect on improved access to basic education in the nine BNTF programme countries. CDB loans and grant resources for school infrastructure have been central to the CDB brand in education. School facilities are often part of larger scale, multi-faceted education enhancement programmes.

174. As a regional financial institution, stakeholders in several BMCs recognise and count on CDB's financing role. However, only six out of the 19 BMCs saw new approvals of direct loans and/or TA grants from CDB in the education sector since 2017, beyond the grant resources provided through the BNTF and CTCS, in addition to four BMCs with active projects approved prior to 2017. That means that in nearly half of the countries CDB has not been the primary source of funding for the education and training sector. Stakeholders consulted in the education ministries often did not know about CDB financing modalities or how to access such funding, in part because it is the Ministry of Finance that is the key interlocutor with the CDB. Many of the BMCs depend on domestic finance and in some cases draw on funding from other bilateral and multilateral development partners (e.g., World Bank, IDB, UK).

175. CDB also leverages additional financing, especially grant resources, for the education sector. CDB has facilitated BMC access to grant resources from GPE, for example, through its role as Coordinating Agent for GPE-funded interventions in the OECS and potential to play the role of Grant Agent. CDB has been exploring how to activate the GPE multiplier, which would bring in additional grant resources for the education sector in GPE partner countries in the OECS.

Conclusion 2: Since 2017, CDB has been recognised as a key actor and reference point in the sector due to its non-financial contributions at regional level and in BMCs. [Finding 4, 7, 11, 15]

176. Alongside its financial contributions to the education sector, CDB has steadily increased its engagement and non-financial support through policy dialogue, coordination, regional initiatives and other modalities. CDB's roles differ across country contexts. It is seen to contribute to policy dialogue in BMCs, particularly in OECS countries. Through a technical advisory and advocacy role that is welcomed by BMCs

and some regional organisations, it has ramped up attention on gender inequalities and social inequities and has begun to foster more inclusive education. Non-financial contributions have also supported BMC capacity change in policy and strategy development.

177. CDB has leverage in the region. It is recognised for its ability to convene different actors due to its relationships with BMCs and regional stakeholders, such as around key policy issues (e.g., SEN, GE in education). It is also recognised for its ability to pilot or scale up innovative initiatives across the region (e.g., Let's REAP) and draw on good practices. There are growing expectations for CDB to be a strong technical partner to help countries set their reform agendas.

178. CDB actively collaborates and coordinates with other key actors, which helps to address fragmentation in the sector. Many sector-wide governance issues, critical for sector reform, have not been fully addressed despite such collaboration. Stakeholders noted that the degree of coordination varies by country and education sub-sector and that greater efforts are required to avoid duplication and create synergies. CDB is well-positioned to facilitate harmonisation and resource sharing because it recognises both regional development and country-specific needs. CDB has played critical role in helping countries respond to COVID-19 through regional initiatives supported reopening of institutions including the Framework for the Reopening of Schools and the Guidelines for implementation of CVQ.

179. Stakeholders consider CDB's comparative strength in the education sector to stem from its familiarity with and presence in the region; its relationships with and ability to convene a broad set of stakeholders; its advisory role and consultative approach. In addition, they highlight CDB's approach in terms of responding to BMC needs instead of pushing a particular agenda.

Conclusion 3: CDB has enabled positive results in individual BMCs, especially in basic education, TVET, and aspects of sector governance. However, its overall investments have not fostered systemic changes of the kind that are required for a more holistic and transformational approach to education in the region. Such systemic changes require a shared definition (or vision) of what 21st century education looks like in the Caribbean [Findings 4, 9, 10, 12]

180. In implementing the ETPS, CDB has supported capacity changes in some BMCs in areas such as basic education SEN, TVET and education sector planning.

- Access to education has been improved through CDB investments in public schools at primary and secondary levels, in early childhood education (ECE) and basic education infrastructure, in TVET infrastructure, primarily at the secondary level, and in tertiary level institutions including UWI.
- In the TVET sector, CDB made notable contributions to improved institutional frameworks and standards (CVQs and NVQs), stronger training institutes and better instructors and programmes.
- CDB has supported development of national policies, strategies and sector plans aimed at creating more inclusive access to education and training systems, and a Model SEN Policy and Strategy is underway – all of which are beginning to address significant gaps in education systems.
- CDB contributions to education sector policy and planning (through networks, regional institutions, training programmes), regional standards, and strategic management and leadership development at ministry and school level are providing a focus on sector governance and management that is important for more effective education systems.

- ETPS support to improved M&E and evidence-based decision making made only limited progress and this area remains a critical priority for BMCs and regional partners.

181. At the same time, these capacity changes have not yet addressed persistent and recent challenges to the sector that warrant increased attention and effort from CDB, other regional actors, and BMCs.

182. When looking at the education system in a holistic manner, BMC reform initiatives have not gone very far. There have been targeted investments, but actors in BMCs and the region have not yet come together in a way that really identifies and responds to the requirements of a 21st century education system in the Caribbean. Recent efforts to develop the Caribbean New School Model move in this direction. This will require addressing many more aspects of the “strengthened governance” dimension of the ETPS and identifying strategies that can address the underlying assumptions of the changes that are ultimately desired – in a system that is more accessible, equitable, participatory, relevant and efficient.

Conclusion 4: CDB’s vision of transformative education is ambitious. Its investment in internal capacity has not been commensurate with that vision and with the expectations that stakeholders have for its role in the region. [Findings 2, 11, 14, 16]

183. While CDB has several comparative strengths that enable its work in the education and training sector, internal capacity constraints limit its ability to respond to exogenous factors and perform in the sector. Over the years, despite the importance of education for the CDB strategy, it has made only modest investment in internal staff capacity. Team members wear multiple hats (from technical advisors to project supervisors to partnership managers) and cover a large number of thematic areas requiring breadth and depth of knowledge across education sub-sectors.

Conclusion 5: CDBs contributions and role in the sector are not well known in the BMCs beyond ministries of education and some key regional partners. [Findings 2, 15, 16]

184. CDB has not measured progress towards ETPS objectives and its reporting on results is limited. CDB has limited information about the results of its work in the sector. Weaknesses in the collection and reporting of M&E data impact the integrity of BMC reporting and limit BMCs and their partners from engaging in strategic, evidence-based policy dialogue and programme development, especially as related to access and equity for large segments of their populations. Results tracking for the education and training sector mainly occurs for the corporate results measurement framework (Level 1 and 2 indicators), published in CDB’s annual reports, the reporting on SDF, and at the project level, through project supervision and completion reports (which have not been readily available). Without quality data, M&E cannot support accountability, transparency and learning to inform strategic policy direction. Limitations in sharing available data and the overall lack of reliable evidence related to performance on specific projects hampers the efforts to avoid pitfalls, results in repeating the same errors in other BMC jurisdictions, and stymies overall improvement.

185. CDB’s support to the education sector is not always visible across the region or across different types of stakeholders. While CDB provides considerable support to countries, stakeholders and partners are not always aware of this support or of the Bank’s priorities and focus areas in the sector. There is room to strengthen CDB’s public relations and communication efforts and direct engagement with non-government stakeholders, including teachers’ unions and principals. The ETPS document is not very well known in the region. Furthermore, stakeholders often question the strategic/relative strengths of CDB in the education sector – What is its niche? Where does it aspire to move the needle? What is CDB’s vision for the education and training sector?

6.2 Recommendations

186. The following recommendations outline the key areas that CDB will need to pay attention to, and invest in, in order to enhance its contributions in the education sector. The recommendations aim to strengthen or build on the work carried out since 2017 while recognising changes in the global and regional context and the update in CDB's strategic plan, which articulates a vision for transformative education systems in the Caribbean. These recommendations reinforce recent commitments of the Council for Human and Social Development (COHSOD) of CARICOM to articulate a clear vision for refocusing the education sector following the impact of COVID-19 and to capitalize on the moment to commit to rethinking education and what it should accomplish.⁸²

Recommendation 1: CDB, led by SSD, should update the ETPS through a consultative process that helps to clarify the Bank's focus areas/key priorities in supporting development of a transformative education system in the Caribbean.

187. The ETPS has provided a comprehensive framework that has enabled it to reflect a wide range of BMC priorities and strategically align with regional and global frameworks and the Bank's complementary strategies and policies. A strategy and policy is a living document that can and should be adjusted to reflect the current context. There are a few areas that should be further clarified in the ETPS:

- Definition of transformational change in the sector and what that means in practice.
- Clarity on the nature of the Bank's support for such transformational change, including definitions and strategies for individual learners, the education system, and priority cross-sector linkages.
- Priorities/focus areas for CDB and defining its flagship initiatives for the next five years (what it will be known for). This review suggests that one of these areas can and should be SEN and inclusivity. TVET is another area that emerges as a potential strategic area for CDB. If CDB prioritises TVET, it should place greater emphasis on strengthening partnerships with CANTA, CXC, CUT and the CARICOM Secretariat. It could play a leading role in driving TVET forward-looking planning, facilitate harmonisation and resource sharing, and be at the forefront of research-based advocacy for TVET as an enabling agent for economic growth. All of these areas would require more intentional investment and greater internal capacity (see also Recommendation 4).
- A clearer strategy on digital literacy/digitalisation, including how to address equity (e.g., providing equipment for those in need, teacher retraining to use technology).
- A more deliberate strategy on how the CDB can support BMCs with education sector governance, such as strengthening EMIS and the approach to digitalisation of education.

188. The Bank should use the ETPS update to carry out consultative processes that include the different perspectives required for a holistic approach to education.

⁸² <https://today.caricom.org/2022/10/20/communique-issued-after-the-forty-fourth-meeting-of-the-council-for-human-and-social-development-cohsod-education-13-14-october-2022/>

Recommendation 2: CDB should use the ETPS update to further clarify its role(s) in the sector through dialogue with other actors in the region.

189. The CDB has played numerous roles in the region – funder, coordinator, convenor, technical advisor, and advocate. There are expectations at regional and BMC level for it to play all of these roles to different degrees. However, CDB role(s) in the sector must be considered in relation to other entities' roles and contributions to the education sector in the region, including CARICOM Secretariat, CXC, OECS Commission, CANTA, others. Each of these bring something different to the table and what is required to transform education systems is a scaled up and coordinated approach to stakeholder engagement.

- **Coordination and convening:** CDB is recognised for its coordinating role and this is something it should enhance going forward. Some regional stakeholders and BMCs look to the Bank to scale up efforts to convene actors in the region to help define distinct roles and responsibilities of regional actors with regard to promoting a shift towards transformative education. A coordination and convening role is time-intensive and would require adjustments in CDB internal capacity.
- **Funding:** CDB continues to be a much-needed source of funding for BMCs and it should continue to allocate a large proportion of SDF resources and leverage additional resources in order to provide financial support for critical initiatives in BMCs and regional institutions.
- **Advocacy:** If CDB intends to support transformation of education systems, then an advocacy role is seen as critical in order to continue to address inequities in the system, complex governance issues that remain unaddressed, and to work with BMCs to establish key priorities on the pathway towards a more transformative education system.
- **Thought Leadership:** Several of CDB's comparative strengths would allow CDB to support thinking on the future of education in the Caribbean in collaboration with other actors. In order to take on this role, however, it would need to prioritise certain thematic/issue areas and strengthen internal capacity (see recommendations 3 and 4).

Recommendation 3: In line with CDB's evolving knowledge management role, the ETPS update should respond to the demand for knowledge exchange and data in the education sector. CDB's role should be broadly communicated to state and non-state actors and development partners in the region.

190. Review findings indicate that the ETPS did not focus as much on evidence generation and creating a culture of evidence-based decision making. Yet this remains a critical priority for BMCs and regional partners. Stakeholders expressed interest in knowledge exchange and supportive activities that include:

- Sharing CDB's own project experience in the sector
- Organising and sharing critical documents and data sources
- Encouraging and sharing more research on key trends (labour market links to education); financial support for such research should also be considered
- Identifying and sharing promising practices in education systems in BMCs (e.g., identifying different centres of excellence for reference points for certain topic areas)
- CDB working with other actors (such as GPE, UNESCO, other IFIs, CARICOM Secretariat) to strengthen national data systems and improve evidence base through M&E capacity at country level.

Recommendation 4: In order to meet expectations and ambitions, CDB will need to strengthen its organisational capacity to play different roles, continue to provide a range of financial and non-financial support, and communicate its contributions to education sector results in the region.

192. This requires combined efforts across all departments and divisions of CDB, including SSD, other areas of the Projects Department, the Department of Economics, human resources, and the communications team. CDB capacity to support the sector can be enhanced by:

- **Expanded human resources:** SSD staff and consultant complement for the sector is stretched thin and this limits the potential to play the different roles that are expected of the Bank. Coordination, for example, is a resource-intensive activity.
- **Enhanced communications:** There is a need for CDB to increase awareness of CDB strengths, priorities, and type of funding in BMCs. CDB needs to share more information about what the Bank is doing in this sector.
- **Stronger monitoring and reporting practice:** These practices are critical for improving results information on CDB's work in the education sector.
- **Clearer linkages to other CDB strategies:** There is a need to further integrate climate change and climate resilience priorities in the ETPS portfolio, including activities that focus on curriculum incorporating climate change, environmental sustainability, climate resilience and energy conservation. Given the greater emphasis on youth in SDF 10, and the Youth Policy and Operational Strategy 2020, the Bank's education sector grants and loans should reinforce and strengthen resource allocation, activity design, indicator frameworks and reporting in these areas.

APPENDIX 1 MANAGEMENT RESPONSE

BACKGROUND

1.1 The Education and Training Policy and Strategy (ETPS) 2017, is the Caribbean Development Bank's third iteration, approved to guide the Bank's investments in education and training. ETPS 2017 was developed in response to the fact, that even though BMCs had attempted to respond to new challenges in a dynamic social and economic environment, they were yet to achieve all the goals specified under the MDGs and reflected in the ETPS (2004). The new ETPS provided the opportunity for more profound analysis of the issues and goals, contextual shifts, and incorporation of the new Sustainable Development Goals (SDGs). Also, the new ETPS anticipated that lessons learned from the design and delivery of the ETPS 2004 and incorporated in ETPS 2017, would assist in strengthening CDB's capacity to achieve the goals of its education and training sector interventions in the future. The ETPS 2017 was structured around four cross-cutting themes: increasing and broadening equitable access and participation; improving efficiency and effectiveness; strengthening institutional capacity; and enhancing technological capacity. As such, ETPS 2017, is intended to improve quality, equity, inclusiveness, relevance, efficiency, and effectiveness, with the strategic imperative of improved quality of education within CDB's BMCs.

1.2 CDB's Management welcomes the independent ETPS 2017 Evaluation and considers the findings and recommendations instructive and useful, as the Bank continues to promote long-term investments in quality and inclusive education, to enable BMCs to increase learner outcomes, reduce poverty and achieve social and economic growth and resilience. The recommendations provide an appropriate suite of follow-up actions which will enhance the continued implementation of the ETPS as well as guide the Bank in advancing the work in the Region in education and training. As stated in the evaluation report, Management agrees that CDB made positive differences in several areas of capacity development under each ETPS objective and critical contributions to improved access through building school infrastructure and education facilities. Management also supports the views of the evaluators that the Bank's interventions were highly relevant since they constitute an appropriate response to the priority needs of the Region. Implementation of the Bank's Policy and Strategy as articulated by the evaluation, has strengthened education sector policy and planning in the region, especially through development and training of networks and communities of practice and support to regional institutions. It has also supported regional standards development, strategic management and leadership development at ministries of education and schools. In the area of special education needs, Management concurs that while CDB is beginning to foster inclusive access through investment projects, policy dialogue and technical inputs, and research and advocacy, these products and services have not yet resulted in sector-wide differences during the review period. Consistent with the Report's findings, Management agrees that CDB's overall performance has been adversely affected by exogenous factors that are common across sectors as well as those specific to the education and training sector, particularly the COVID-19 pandemic. As noted, the pandemic increased challenges, changed priorities and raised the bar in the sector and for CDB.

1.3 ETPS 2017 implementation to date, has resulted in many valuable sector enhancements and lessons that can inform an updated ETPS as well as the development and implementation of CDB's transformational education agenda. Management accepts that both the lessons and recommendations of the ETPS Evaluation should be adopted and incorporated within its operations, to further allow CDB to improve its development effectiveness and assist its BMCs in creating an ever-expanding pool of productive Caribbean citizens with the knowledge, skills, attitudes and values necessary to lead purposeful and productive lives in an internationally competitive environment.

Recommendations	Management Comments / Responses <i>(Accepted/ Accepted but Modified/Rejected)</i>	Commitments / Actions	Responsibility Centre	Target Completion Date (Y/M/D)
<p>Recommendation 1: CDB, led by SSD, should update the ETPS through a consultative process that helps to clarify the Bank’s focus areas/key priorities in supporting development of a transformative education system in the Caribbean.</p> <p>There are a few areas that should be further clarified in the ETPS:</p> <ul style="list-style-type: none"> ▪ Definition of transformational change in the sector and what that means in practice. ▪ Clarity on the nature of the Bank’s support for such transformational change, including definitions and strategies for individual learners, the education system, and priority cross-sector linkages. ▪ Priorities/focus areas for CDB and defining its flagship initiatives for the next five years (what it will be known for). This review suggests that one of these areas can and should be Special Education Needs (SEN) and inclusivity. TVET is another area that emerges as a potential strategic area for CDB. If 	<p>Accepted: Management accepts the recommendation as stated, inclusive of the consultative process to update the ETPS and the elaboration/clarification of key terms and concepts.</p> <p>Management notes and supports the recommendation regarding defining the Bank’s flagship initiatives for the next five years. While SEN and Inclusion have been a focus of the Bank for some time, the Bank intends to broaden its investment in the sub-sector with the approval and ratification of the Model Regional Special Education/Inclusive Education Policy and Strategy. SEN/Inclusive Education Policy and Strategy will provide a framework to guide BMCs in the customisation of national policies, strategies and interventions.</p> <p>With its unique focus on workforce development, Management recognises that TVET has the potential to contribute to employment and productivity to better support</p>	<p>The Bank commits to updating the current ETPS.</p> <p>Key lessons from implementation of ETPS 2017 will be incorporated into future projects/programmes within CDB to enhance the Bank’s interventions and deliver on the transformational agenda.</p> <p>The Model Regional SEN/Inclusive Education Policy and Strategy is expected to be completed and approved by CDB in Q4 2023 and ratified by CARICOM in Q1 2024.</p> <p>The Bank commits to continuing its support for the enhancement and expansion of TVET and increasing that investment across BMCs over the next five years.</p>	<p>SSD</p> <p>Social Sector Division</p> <p>SSD/Private Sector Division</p>	<p>September 2024</p> <p>June 2024</p> <p>Ongoing</p>

REVIEW OF CDB'S EDUCATION AND TRAINING POLICY AND STRATEGY

Recommendations	Management Comments / Responses <i>(Accepted/ Accepted but Modified/Rejected)</i>	Commitments / Actions	Responsibility Centre	Target Completion Date (Y/M/D)
<p>CDB prioritises TVET, it should place greater emphasis on strengthening partnerships with CANTA, CXC, CUT and the CARICOM Secretariat. It could play a leading role in driving TVET forward-looking planning, facilitate harmonisation and resource sharing, and be at the forefront of research-based advocacy for TVET as an enabling agent for economic growth. All of these areas would require more intentional investment and greater internal capacity (see also Recommendation 4).</p> <ul style="list-style-type: none"> ▪ A clearer strategy on digital literacy/digitalisation, including how to address equity (e.g., providing equipment for those in need, teacher retraining to use technology). ▪ A more deliberate strategy on how the CDB can support BMCs with education sector governance, such as strengthening EMIS and the approach to digitalisation of education. 	<p>sustainable economic transformation of its BMCs. As recommended, the existing partnerships with regional TVET agencies will be strengthened.</p> <p>In keeping with the Bank’s Strategic Plan Update 2022 to 2024, Management agrees and commits to strengthening its investment of innovative projects, timely research, and knowledge sharing activities around the effective and appropriate use of information and communication technologies (ICTs) in education.</p>	<p>Looking ahead, consistent with the Strategic Plan Update 2022-2024, the Bank proposes to <i>inter alia</i>:</p> <ul style="list-style-type: none"> (a) development/adopt of accessible and appropriate learning portals/management systems/ICT platforms for ubiquitous access to education content and engagement; (b) promote policy reforms to support increased digital access for schools and subsidised ICT access for homes for the purpose of learning, development of model/pilot schools as centres of excellence (Basic Education; TVET; and Tertiary Education) for sustainable education; (c) support for BMCs’ work with internet service providers to expand ICT coverage to under-served/hard-to-reach areas; 	<p>SSD</p>	<p>Ongoing</p>

Recommendations	Management Comments / Responses <i>(Accepted/ Accepted but Modified/Rejected)</i>	Commitments / Actions	Responsibility Centre	Target Completion Date (Y/M/D)
		<p>(d) continue/scale-up support for device availability and connectivity initiatives for schools, indigenous communities and families with support targeted as the most vulnerable; and</p> <p>(e) support the training and certification of teachers and principals to effectively function in a student-centred distributed/on-line/blended teaching-learning environment.</p>		
<p>Recommendation 2: CDB should use the ETPS update to further clarify its role(s) in the sector through dialogue with other actors in the region.</p> <ul style="list-style-type: none"> ▪ Coordination and convening: CDB is recognised for its coordinating role and this is something it should enhance going forward. Some regional stakeholders and BMCs look to the Bank to scale up efforts to convene actors in the region to help define distinct roles and responsibilities of regional actors with regard to promoting a shift towards transformative education. A coordination and convening role is 	<p>Accepted: The Bank agrees with Recommendation 2 that the ETPS update should be used to clarify and enhance engagement with partners and key stakeholders on the Bank’s role in the sector in the region, particularly as it relates to coordination and convening, funding, advocacy and thought leadership.</p> <p>With respect to coordination and convening, CDB operates as Coordinating Agency for the Global Partnership for Education (GPE) for the OECS Member States. As Coordinating Agency, CDB provides an essential service to GPE/OECS</p>	<p>Over the short to medium term, the Bank commits to increasing its coordinating role, inclusive of funding, advocacy and thought leadership. Specifically, the Bank will increase its outreach as Coordinating Agency for Projects for which the OECS and World Bank have been the Grant Agent.</p> <p>In addition, CDB will:</p> <p>(a) expand its convening and coordinating responsibilities as Co-chair of the Regional Education Group for the</p>	Social Sector Division	Ongoing

REVIEW OF CDB'S EDUCATION AND TRAINING POLICY AND STRATEGY

Recommendations	Management Comments / Responses <i>(Accepted/ Accepted but Modified/Rejected)</i>	Commitments / Actions	Responsibility Centre	Target Completion Date (Y/M/D)
<p>time-intensive and would require adjustments in CDB internal capacity.</p> <ul style="list-style-type: none"> ▪ Funding: CDB continues to be a much-needed source of funding for BMCs and it should continue to allocate a large proportion of SDF resources and leverage additional resources in order to provide financial support for critical initiatives in BMCs and regional institutions. ▪ Advocacy: If CDB intends to support transformation of education systems, then an advocacy role is seen as critical in order to continue to address inequities in the system, complex governance issues that remain unaddressed, and to work with BMCs to establish key priorities on the pathway towards a more transformative education system. ▪ Thought Leadership: Several of CDB's comparative strengths would allow CDB to support thinking on the future of education in the Caribbean in collaboration with other actors. In order to take on this role, however, it would need to prioritise certain 	<p>partner countries, which strengthens our relationship with government partners and positions the Bank as an influential local education group partner. CDB also serves as a member of the local education group for the OECS and Guyana, a collaborative forum of stakeholders within the education sector. The Bank has therefore contributed to the development, implementation, monitoring and evaluation of education sector plans at the country-level. CDB is also a founding and active member of the Regional Education Partners Forum, a dedicated platform for development partner agencies to discuss priorities, advocacy and thematic issues around education for the Caribbean.</p> <p>The Bank is also in the process of completing the accreditation process to become a grant agent to the GPE. As grant agent, CDB will be eligible to receive GPE grant funds, either on behalf of a partner country or for specific programs.</p> <p>Management accepts the need to prioritise the coordination of the increasing number of players in the</p>	<p>OECS and the Local Education Group for Guyana</p> <ul style="list-style-type: none"> (b) Establish a Communities of Practice (COPs) focused learning enhancement under the Regional Learning Recovery Programme (Let's REAP). The CPO currently comprises the CARICOM Secretariat and OECS Commission. (c) deepen collaboration with other development partners such as IADB, WB, UNICEF, UNDP, UNESCO and GPE to increase access to more concessional resources and technical assistance. (d) maintain engagement with key regional groups such as the Regional Network of Education Planning Officers. <p>The work programme for 2024 and 2025 contemplates the development of knowledge products on Financing Education and learning enhancement.</p>		<p>June 2024</p> <p>Ongoing</p> <p>Ongoing</p>

Recommendations	Management Comments / Responses <i>(Accepted/ Accepted but Modified/Rejected)</i>	Commitments / Actions	Responsibility Centre	Target Completion Date (Y/M/D)
<p>thematic/issue areas and strengthen internal capacity.</p>	<p>region, whether between multilateral development banks (MDBs), between MDBs and the private sector or between these institutions and philanthropic entities.</p> <p>The CDB is the largest financier and provider of technical assistance to education in the Caribbean, helping its BMCs to reach SDG4: access to inclusive and equitable quality education and lifelong learning opportunities for all by 2030. However, access to adequate and affordable finance for the education and training sectors remains a significant challenge for the Region. Management, therefore, agrees that CDB must continue to build strategic partnerships to have greater access to concessional financing for the sector.</p> <p>Management supports the recommendation that the updated ETPS should place CDB at the centre of the transformative agenda for education. The Bank through its various channels will continue to promote a vision for education that advances inclusion, equity, and social resilience.</p>			

REVIEW OF CDB'S EDUCATION AND TRAINING POLICY AND STRATEGY

Recommendations	Management Comments / Responses <i>(Accepted/ Accepted but Modified/Rejected)</i>	Commitments / Actions	Responsibility Centre	Target Completion Date (Y/M/D)
	<p>The Bank’s Education Team routinely collaborates with other boundary partners, development organisations and institutions of learning around thought leadership and the development of knowledge products. The Bank accepts the consultant’s recommendation that its comparative strengths and the Bank’s proposed Knowledge Hub, should be utilised to allow CDB to do more to support thinking on the future of education and filling important knowledge gaps across the sector. In doing so, it will highlight gaps between current practice and what the evidence suggests would be most effective in promoting learning, and it will give governments a way to set priorities and track progress as they work to close those gaps.</p>			
<p>Recommendation 3: In line with CDB’s evolving knowledge management role, the ETPS update should respond to the demand for knowledge exchange and data in the education sector. CDB’s role should be broadly communicated to state and non-state actors and development partners in the region.</p>	<p>Accepted: Management acknowledges and accepts the role that the Bank, through the updated ETPS, must play in responding to the demand for greater knowledge exchange and data sharing in the education sector. The Bank has financed the first and second Monitoring Reports on the 2020 CARICOM Human Resource Development Strategy (C-HRDS</p>	<p>Along with contributing to the development of the Bank’s Knowledge Hub, CDB will continue to provide resources to make it easy for countries to report their data. Actions which will also be pursued within the organisation to include the preparation of policy guidelines, training and the dissemination of tools and knowledge products. Besides</p>	SSD	Ongoing

Recommendations	Management Comments / Responses <i>(Accepted/ Accepted but Modified/Rejected)</i>	Commitments / Actions	Responsibility Centre	Target Completion Date (Y/M/D)
<p>1. Stakeholders expressed interest in knowledge exchange and supportive activities that include:</p> <ul style="list-style-type: none"> ▪ Sharing CDB’s own project experience in the sector ▪ Organising and sharing critical documents and data sources ▪ Encouraging and sharing more research on key trends (labour market links to education); financial support for such research should also be considered ▪ Identifying and sharing promising practices in education systems in BMCs (e.g., identifying different centres of excellence for reference points for certain topic areas) ▪ CDB working with other actors (such as GPE, UNESCO, other IFIs, CARICOM Secretariat) to strengthen national data systems and improve evidence base through M&E capacity at country level. 	<p>2030). The reports are prepared biennially in collaboration with the Regional Network of Education Planning Officers (RNPO) and presented/endorsed by the CARICOM Council on Human and Social Development (COHSOD).</p>	<p>continuing to support the preparation of the C-HRDS 2030 wider dissemination will be done in partnership with the RNPO. Various knowledge sharing interventions will be supported through the COPs, the Regional Education Groups, periodic regional symposia and conferences convened in collaboration with other development partners (UNESCO, WB, IADB etc)</p> <p>Completion of the Gender-Differential Labour Market Impact Study</p> <p>CDB will continue to support the Ministries of Education to introduce and maintain adequate EMIS, especially those which are affordable, configured according to the education systems and with the capacity for learning support, as appropriate. These include EMIS such as the UNESCO-supported Open EMIS solution.</p>	<p>SSD & Economics Department</p>	<p>Ongoing</p> <p>September 2024</p> <p>Ongoing</p>
<p>Recommendation 4: In order to meet expectations and ambitions, CDB will need to strengthen its organisational</p>	<p>Accepted: CDB’s operations in the education and training sector are led by two full-time staff, and an</p>		<p>SSD</p>	<p>Ongoing</p>

REVIEW OF CDB'S EDUCATION AND TRAINING POLICY AND STRATEGY

Recommendations	Management Comments / Responses <i>(Accepted/ Accepted but Modified/Rejected)</i>	Commitments / Actions	Responsibility Centre	Target Completion Date (Y/M/D)
<p>capacity to play different roles, continue to provide a range of financial and non-financial support, and communicate its contributions to education sector results in the region.</p> <p>This requires combined efforts across all departments and divisions of CDB, including SSD, other areas of the Projects Department, the Department of Economics, human resources, and the communications team. CDB capacity to support the sector can be enhanced by:</p> <ul style="list-style-type: none"> ▪ Expanded human resources: SSD staff and consultant complement for the sector is stretched thin and this limits the potential to play the different roles that are expected of the Bank. Coordination, for example, is a resource-intensive activity. ▪ Enhanced communications: There is a need for CDB to increase awareness of CDB strengths, priorities, and type of funding in BMCs. CDB needs to share more information about what the Bank is doing in this sector. 	<p>education consultant in the Social Sector Division (SSD). The Team also provides substantive technical inputs to various Bank and regional initiatives in the sector. As highlighted in the Report, team members wear multiple hats (from technical advisors to project supervisors to partnership managers) and cover a large number of thematic areas requiring breadth and depth of knowledge across education sub-sectors. Management accepts that in order to meet the growing demands of the sector, the updated ETPS and the work of the sector may require an expanded human resource pool, either on staff and/or on a contractual basis.</p> <p>The Bank recognises the importance of communication as an effective strategy to increase awareness of CDB's strengths, priorities, and a means to share more information about what the Bank is doing in the sector.</p>	<p>The Bank will continue to ensure that the necessary capacity is provided to carry out the transformation agenda in education. Two additional full-time staff will be recruited by June 2024</p> <p>The Education Team commits to communicating early and often using multiple channels, localizing communication efforts, and ensuring inclusivity in messaging. A communication strategy will be implemented in partnership with CCU.</p>		<p>July 2024</p> <p>Ongoing</p>

Recommendations	Management Comments / Responses <i>(Accepted/ Accepted but Modified/Rejected)</i>	Commitments / Actions	Responsibility Centre	Target Completion Date (Y/M/D)
<ul style="list-style-type: none"> ▪ Stronger monitoring and reporting practice: These practices are critical for improving results information on CDB's work in the education sector. ▪ Clearer linkages to other CDB strategies: There is a need to further integrate climate change and climate resilience priorities in the ETPS portfolio, including activities that focus on curriculum incorporating climate change, environmental sustainability, climate resilience and energy conservation. Given the greater emphasis on youth in SDF 10, and the Youth Policy and Operational Strategy 2020, the Bank's education sector grants and loans should reinforce and strengthen resource allocation, activity design, indicator frameworks and reporting in these areas. 	<p>The Bank notes the recommendation and concurs that there is need for augmented monitoring and reporting practices to improve results across its investments in education and training. The Bank is committed to enhancing the integration of other CDB Strategies in its various education investments. Management accepts that education is a major vehicle for climate change awareness and that investments in education can play a huge role in building climate resilience and advancing climate mitigation and adaptation. All education infrastructure financed includes Climate Vulnerability Risk Assessments (CRVA) to ensure that facilities are climate smart and reflect environmental sustainability. Curricula reform initiatives financed by the Bank includes strengthening climate resilience and environmental sustainability. Also, Management encourages an intersectional approach to its work in education and training and therefore supports the inclusion of youth participation at every stage of the project/investment cycle for its education projects. In this regard, CDB is committed to bolstering investments in youth-</p>	<p>Education projects will include public education activities to support sensitisation of projects and the initiatives they promote.</p> <p>The Bank intends to continue the inclusion of robust RMFs for upcoming education interventions. In addition, appropriate training activities on the Bank's RMFs for project management teams will be undertaken during project launches and project implementation.</p> <p>Projects will continue to promote climate smart solutions and, where needed, support curricula reforms which strengthen environmental sustainability and climate change.</p> <p>To track CDB's programming in youth development and empowerment, a simple two-track process will be adopted: (i) youth-specific interventions that are specifically or primarily designed for youth beneficiaries (ii) Youth mainstreamed interventions - that are not designed specifically for youth but where youth considerations are integrated into the</p>		<p>Ongoing</p> <p>Ongoing</p> <p>Ongoing</p>

REVIEW OF CDB'S EDUCATION AND TRAINING POLICY AND STRATEGY

Recommendations	Management Comments / Responses <i>(Accepted/ Accepted but Modified/Rejected)</i>	Commitments / Actions	Responsibility Centre	Target Completion Date (Y/M/D)
	responsive programming via youth mainstreaming across its projects and programmes and youth-specific investments.	<p>project cycle⁸³. Projects such as the Youth Economy Project in St. Lucia, which was approved in June 2023, will be a focus in the medium term.</p> <p>Specifically, under YPOS and Action Plan - Harness Young People's Social and Intellectual Capital, indicators have been included to address the education and training sector. These indicators will serve as a monitoring tool and as a resource mobilisation instrument. The indicators will be used to track and measure the Bank's progress on implementation of education related investments under the YPOS 2020.</p>		

⁸³ An intervention would be determined to be youth mainstreamed where young people/youth considerations are integrated in analysis, design, implementation, monitoring and evaluation of programmes to ensure youth interests are met.

APPENDIX 2 TERMS OF REFERENCE

1. INTRODUCTION

1.01 The Office of Independent Evaluation (OIE) Five-Year Plan includes sector, thematic, and policy evaluations to inform Board and Management decision-making.

1.02 This review of the Education and Training Policy and Strategy (ETPS) aims to provide credible and reliable information on the performance of the Caribbean Development Bank (CDB or the Bank) in the education and training sector during the 2017-2021 period to enable lessons and recommendations to be drawn that may be used to improve the development effectiveness of the Bank's future strategies and programming.

2. CONTEXT AND BACKGROUND

2.01 For the most part, the Caribbean Region is facing intense pressures in realising its legitimate development aspirations. The goals of poverty reduction and ultimate eradication, economic enfranchisement to end the scourge of intergenerational hardships in an environment that is more stable and secure, seem particularly challenging. Recent data suggest that approximately 1 in 5 persons still live in poverty. Evidence suggests that regional performance in the Human Development Index (HDI) declined during the period 2008 – 2018.

2.02 Improving BMCs' chances of realising the SDGs requires investment and policy intervention in key areas including expanding access to education to boost factor productivity, while making growth more inclusive; diversification of output bases and harnessing technology in a manner that expands production possibility frontiers.

2.03 To varying degrees, there are inequities in access and participation among and within BMCs at all levels of education. Except for Haiti, BMCs report having attained Universal Primary Education (UPE) and the majority have achieved Universal Secondary Education (USE) as well; however, there are children in hinterland regions and remote islands/areas who experience considerable difficulties in attending school regularly and who do not have access to the same quality of education as their peers in urban areas locations. Survival rates to Form 5 vary considerably within and across BMCs, due to the high number of male students who do not survive until the end of the cycle.

2.04 Even though pass rates increased by over 12% during the period of the 2004 ETPS, there are still only average levels of school leavers (43.2% in 2014) who graduate with five or more Caribbean Secondary Education Certificate (CSEC) subjects, including English and Mathematics. There are also high levels of non-certificated school leavers and low levels of certification relative to the workforce's needs. Many students who enter secondary schools do not acquire the foundational skills to equip them for the world of work and lifelong learning. More specifically, evidence suggests that relative to those who wrote English A at CSEC in 2014, only a tiny percentage wrote examinations in subjects considered essential for today's labour market needs.

2.05 The absence of appropriate enabling environments across BMCs has led to an inability on the part of many Ministries of Education (MOE) to identify and address deficiencies in processes required for enhanced governance. There is often an absence of standards for education, accountability, transparency, and reliable data, all of which are needed to evaluate the system's performance and engagement in evidence-based decision-making. There is also limited research

capacity to inform decision-making, and many BMCs lack the capacities at both school and system levels for efficient and effective leadership of the sector.

2.06 CDB's vision of the purpose of education and training in the 21st century acknowledges the role of education as a future-oriented and life-long process of realising individual potential.

2.07 The overall ETPS goal was to improve the quality of education in BMCs, leading to increased learner outcomes producing a qualified, capable and representative workforce of diverse individuals, to reduce poverty and achieve inclusive social and economic development for the Region.

2.08 The Policy has three objectives, namely: (a) to develop education and training systems that provide for equitable access and participation across all levels of the system, (b) to enhance efficiency, relevance and effectiveness of education and training to create systems that are responsive to national, regional and global labour markets, and (c) to strengthen capacity to reform and manage education systems to enhance student outcomes.

2.09 An overview of the ETPS portfolio of interventions and TAs under implementation during the period 2017-2021 is provided in Appendix 1.

3. REVIEW SCOPE

3.1 The review will assess the CDB's ETPS, and the portfolio of investment projects, TAs and activities under implementation during the period (2017-2021) that has taken place pursuant to it. The review will focus on the three main areas of intervention of the ETPS and all education levels (ECD, primary, secondary and tertiary education and TVET):

- Access, Equity and Participation: Development of education and training systems that provide for equitable access and participation across all levels of the system.
- Efficiency, Relevance and Effectiveness: Enhanced efficiency, relevance and effectiveness of education and training to create systems that are responsive to national, regional and global labour markets.
- Governance: Strengthened capacity to reform and manage education systems for the purpose of enhancing student outcomes.

3.2 The ETPS summary (Appendix 2) sets out objectives and indicators for these three areas and will be a principal reference for the assessment.

3.3 The portfolio of investment and TA projects that will be considered the ETPS portfolio and within the scope of this review is represented by those investments under implementation during the period 2017-2021 (Appendix 1). Education and training sector facilities financed by other donors but executed by CDB will also be within scope. Where prior assessments of these facilities have been done, they will inform this review and its portfolio sampling strategy.

3.4 As well, the review will assess CDB's:

- outreach to BMCs and the extent to which it has positioned CDB as a sector leader and played a role in mobilising resources for its BMCs from outside the region; and
- ability to provide a forum for sharing information on the education and training sector.

3.5 In addition to assessing the performance of the ETPS over the 2017-2021 period, the review will present lessons and recommendations for an updated ETPS and future programming.

4. REVIEW QUESTIONS AND METHODOLOGY

4.01 The review questions will have primary application to the ETPS design (Appendix 2) and the results framework of relevant interventions. The consultants may reconstruct a Theory of Change (ToC) as necessary to help identify plausible causal relationships between inputs, activities, and the expected outputs, outcomes, and development impacts.

4.02 In addition to assessing the performance of ETPS, the review will present the key issues and lessons for the future and corresponding recommendations.

4.03 Finally, the review will assess CDB's capacity to prepare projects, be responsive to client needs, conduct procurement and supervision, conduct policy dialogue, coordinate aid, and adhere to its policies.

4.04 Formal performance ratings will not be required in this review. Instead, areas of strength and weakness, lessons, and opportunities for improvement will be identified.

4.05 A draft set of questions are presented below, which will be confirmed during the inception phase.

This review will examine four overarching questions relating to two main units of analysis – the CDB's ETPS, and the portfolio of investment projects and TAs influenced by it. All the review questions are intended to be applied to all levels of education, including ECD, primary, secondary and tertiary education and TVET.

A. To what extent are the ETPS and its portfolio of investment projects and TAs fit for the purpose of improving the quality of education in BMCs, increasing learning outcomes and producing a qualified, capable and representative workforce of diverse individuals, to reduce poverty and achieve inclusive social and economic development for the Region?

1. Whether the design of ETPS was appropriate, including indicators and expected outcomes.
2. How well did ETPS, its portfolio of investments and TAs fit with other CDB policies (i.e. the Gender Equality Policy and Strategy, the Technical Assistance Policy and Strategy, the Poverty Reduction Strategy, the Regional Cooperation and Integration Policy and Strategy and the Climate Resilience Strategy 2012-17)?
3. To what extent were the ETPS, its portfolio of investments and TAs appropriate to respond to 21st century challenges and imperatives (i.e. digitalisation)?
4. To what extent did the ETPS, its portfolio of investments and TAs focus on climate change (in terms of resilience of education infrastructure and enhancing knowledge and awareness on climate change)? Was the focus adequate to support countries in facing climate change challenges?
5. The extent to which all CDB education and training interventions applied a gender lens and integrated gender considerations. Was the gender approach appropriate?
6. How well did CDB respond to COVID-19 in adapting the implementation strategy of the ETPS, its portfolio of investments and TAs? Was CDB's response effective? How?

7. What factors were the strengths and weaknesses of the ETPS during COVID-19? What lessons can be drawn to enhance the ETPS support to BMC's during and post COVID-19?
- B. Taking into consideration the state of maturity of the ETPS portfolio, to what extent did the ETPS, the portfolio of investment projects and TAs achieve or are likely to achieve the expected outputs and outcomes?
1. To what extent have the portfolio of investments and technical assistance met or are likely to meet their output and outcome targets?
 2. What factors explain the success or the failure of ETPS and its portfolio of investments and technical assistance?
 3. The extent to which poor and marginalised groups were targeted across all levels of education.
 4. The extent to which ETPS is succeeding in supporting Regional Cooperation and Integration of the education and training sector?
 5. To what extent did ETPS identify the main governance challenges in the education sector? What was the contribution played by ETPS and its portfolio in addressing these governance challenges? Have national education systems been strengthened?
 6. Are achievements of the portfolio of investments and technical assistance likely to be sustained after funding ends? What are the critical risks, and how could they be mitigated?
- C. What role did CDB play in the education sector?
1. The extent to which CDB was able to serve as a catalyst for attracting resources to the Region to support necessary education and training sector reforms.
 2. What was the added value played by CDB in the education sector compared to other international players?
 3. Whether ETPS took proper account of the potential for complementarity, coordination and cooperation with other players.
 4. Can lessons be learned from the education sector approach of other development banks?
- D. To what extent did CDB make appropriate internal institutional adaptations to deliver on the commitments of the ETPS?
1. The extent to which CDB adapted its priorities, internal capacity, and processes to support ETPS.
 2. The extent to which CDB was able to create and deploy appropriate and innovative instruments to address the needs of BMCs.
 3. Whether an adequate alignment of country strategies with the ETPS occurred.
 4. Whether an appropriate monitoring and evaluation system provided valuable and reliable information for tracking progress and for adaptive management at project/programme level.

5. Whether, as outlined in the ETPS, the private sector was engaged and mobilised in support of post-secondary education and TVET.
6. Whether Project Preparation Assistance (PPA) was an effective approach to assisting BMCs in preparing projects?

5. EXECUTION

5.01 The review exercise will be structured around the following three main phases:

- (a) Document Review: To answer the review questions, a review team will gather evidence from various sources. A desk review will include the analysis of publicly available documents of the BMCs' governments and other multi-lateral institutions, as well as relevant Bank documents related to the ETPS, including but not limited to strategic planning and policy documents, previous evaluations, country strategy papers, appraisals, progress monitoring reports, and project completion reports).
- (b) Portfolio of interventions and TAs review: To assess the extent and quality of the ETPS, the review will examine a sample of interventions under implementation during the period 2017-21.
- (c) Data collection: The data collection phase will include data gathering from relevant stakeholders through interviews, focus group discussions, and surveys. Due to the spread of COVID-19 and travel restrictions, the review will consider alternative/complementary data collection methods to avoid traveling and ensure stakeholders' protection and safety.

5.02 The Consultant Team will be expected to design and implement a robust review drawing from recognised good practice standards. A theory-based approach would be helpful to identify ETPS's intended outcomes and logic chains. Theory development will be undertaken at the inception stage of the review.

5.03 The following guidelines should be considered for developing the ETPS review methodology:

- (a) Specific review questions, derived from the general questions outlined in Section 4, will be developed in consultation with OIE.
- (b) A methodology that makes the best use of existing secondary data and devises efficient means of primary data collection to support findings and conclusions will need to be developed. It should be based on the overall ETPS and an adequately representative sample of interventions to assess Bank performance over the period.
- (c) Document review, including CDB and other multi-lateral institutions, Country Strategies, related evaluations by OIE and other evaluation offices, and available portfolio documentation (appraisal reports, PSRs, PCRs, PCVRs), will be a starting point.
- (d) The data collection phase will include data gathering from methods to avoid traveling and ensure all stakeholders' protection and safety.
- (e) Formal ratings of criteria and Bank performance on a Likert scale will not be required in this review. Instead, areas of strength and weakness, lessons, and opportunities for improvement will be identified.

6. REPORTING REQUIREMENTS / DELIVERABLES

- 6.01 The review consultants shall provide the following documents and reports to OIE:
- (a) Deliverable 1- Inception Report: The inception report will be based on an initial review of documents and discussions with Bank staff and will include a complete evaluation design including overall approach (including ToC if required); specific review questions; methods; sampling, data collection, and analysis plan; draft interviews and/or survey instruments; measures to ensure ethical conduct and confidentiality; and timeline of activities. The inception report should include an evaluation matrix. Comments from OIE will be provided within two weeks of submission.
 - (b) Deliverable 2 – Findings and Conclusions Report: The findings and conclusions report will contain the initial compiled, organized, and analysed evidence from the document review, portfolio analysis, interviews and surveys, and field visits. Comments to be provided by OIE within two weeks of submission.
 - (c) Deliverable 3 - Draft Final Review Report: (maximum 40 pages minus annexes) to include validated findings and conclusions, present lessons and recommendations, and a strategy for dissemination. Comments from OIE to be provided within two weeks of submission.
 - d. Deliverable 4 - Final Review Report: The final review report will include an executive summary (no longer than six pages). A PowerPoint presentation, clearly explaining the report and its findings, conclusions, and recommendations will also be required.

7. ASSIGNMENT TIMEFRAME

- 7.01 A multi-disciplinary review team will require a level of effort of approximately 144 person-days.
- 7.02 The review will commence in February 2022, and the submission of the final report in July 2022.
- 7.03 The proposed timeline is summarised as follows:

ACTIVITY	DATES
Contract	February 2022
Document Review and Inception	February 2022
Data Collection	March – April 2022
Draft Findings and Validation	May 2022
Final Report	July 2022

8. TEAM QUALIFICATIONS

- 8.01 The review team should command the following expertise:
- (a) Experience in the design and conduct of evaluations, including of policies and strategies

- (b) Knowledge/experience with policy formulation and programme delivery in the education and training sector (including ECD, primary, secondary and tertiary education and TVET)
- (c) Knowledge of existing and emerging approaches to digitalisation in education policy objectives and delivery, particularly in the Covid context
- (d) Experience in equity in education (gender, learners with special educational needs, inclusive education, etc.)
- (e) Experience working with multi-lateral banks and government clients
- (f) Knowledge of development issues in the Caribbean, including of its education systems
- (g) Strong inter-cultural communication skills in English
- (h) Ability to integrate qualitative and quantitative data
- (i) Strong report writing and presentation skills ability and experience in communicating concepts using non-technical language to diverse audiences
- (j) Ability to work in an iterative, collaborative, team approach; and give and receive constructive feedback.

9. MANAGEMENT OF THE REVIEW

- 9.01 The consultants will report to CDB's Office of Independent Evaluation (OIE), which will provide overall direction, guidance, and deliverables approval. The OIE will convene an Advisory Group of principal stakeholders from the Operations area of the Bank for this review. The Group will provide feedback on the scope of work, review design and work plan, findings, and draft reports.

10. SUPPORTING DOCUMENTATION

Appendix 1	Overview of the Portfolio of Projects and Technical Assistance
Appendix 2	ETPS Summary
Appendix 3	CDB's Education and Training Policy and Strategy
Appendix 4	CDB's Strategic Plan Update 2022-2024

The contents of this document and any appendices are intended solely for the addressees and may contain confidential and/or privileged information and may be legally protected from disclosure

APPENDIX 3 METHODOLOGY

This appendix presents the overall approach and framework for the review and the methods for data collection and analysis.

Overall Approach and Framework

The Review was guided by a Theory of Change and a Review framework, as further described below. In approaching each of these constructs and the identified methods for data collection and analysis, the Review team placed special emphasis on gender and equity dimensions. This was done in a cross-cutting way and integrated into the questions and indicators in the Review matrix, the approach in each of the illustrative cases, the identification of key stakeholders to interview, and the review of secondary data (such as the CDB portfolio).

Theory-driven approach using a Theory of Change

The Review took a theory-driven approach using a theory of change (TOC) developed in association with CDB stakeholders as the basis for examining the performance of ETPS. Central to the approach was reconstructing an overarching working TOC intended to capture key elements of the thinking that underlies the ETPS.⁸⁴ The Review used the TOC to compare the policy's intentions, underlying assumptions, key types of expected results and planned implementation strategies with what actually transpired over the review period. The TOC informed the Review Matrix and helped frame the data collection, analysis and findings of the Review. The TOC is based on the ETPS's partial results framework and its contextual framework⁸⁵ as well as insights gleaned in interviews and the TOC workshop with CDB stakeholders in April 2022. The working TOC was updated at the end of the Review process to inform a potential ETPS update or renewal.

The working TOC and its underlying logic are described in the paragraphs and exhibits below. The CDB invests in an environment where multiple actors and factors influence and shape the education and training sector. As reflected in the ETPS, CDB aims to (directly or indirectly) contribute to changes at different levels through its activities including project investments, TA and non-financial interventions. Exhibit II.i [Error! Reference source not found.](#) presents the notion of a “ripple effect” in which activities lead to short-term and long-term changes across the sector. The TOC identifies two intended **levels of change** within education and training systems stemming from ETPS supported activities:

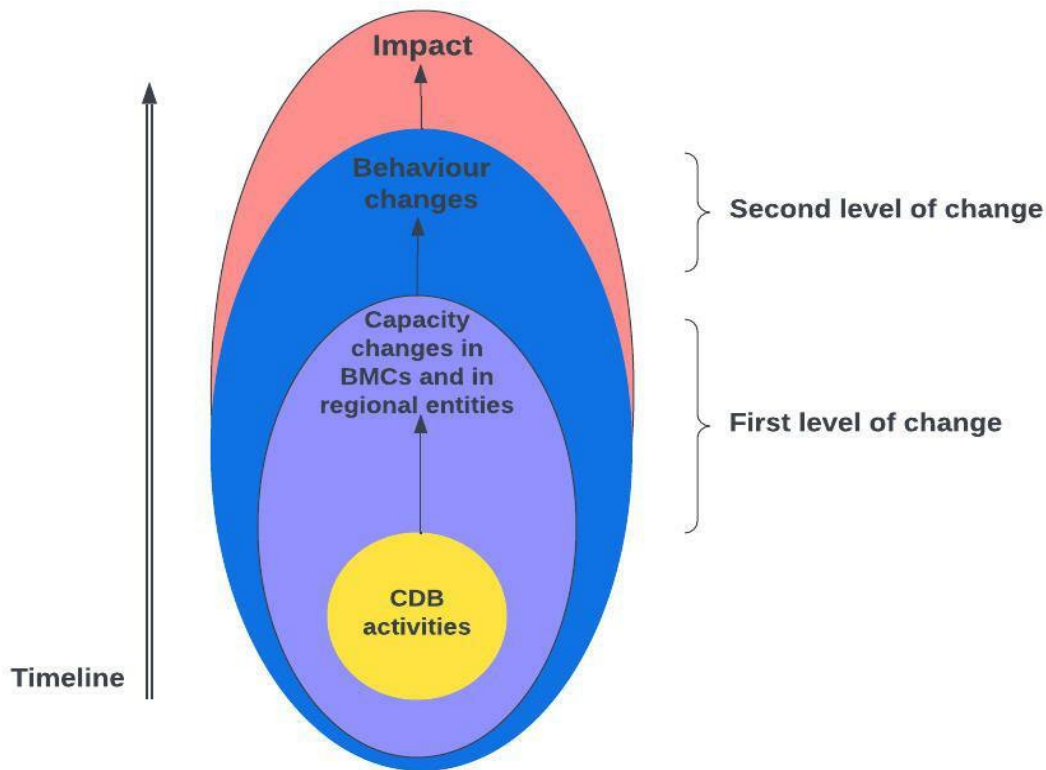
- The first level of change encompasses **changes in capacity** in BMCs and regional entities. Capacity is defined as the whole ‘package’ of factors that constitute individuals’ and organizations’ potential for action, including individuals’ knowledge, skills and thinking as well as organisational and institutional systems, processes, tools, resources and incentives. Based on consultations, we understand that CDB is expected to contribute to change primarily at this level.
- The second level of change relates to longer-term **behaviour changes**, in BMCs and regional entities. Behaviour changes occur when actors use their new capacity (knowledge, tools, systems) in performing their roles or mandates in the education and training system. Such changes would be seen in the on-going application of new policies and practices. Behaviour changes are expected to bring about tangible changes in the education system.

⁸⁴ The ETPS itself lacks specificity in key areas, including identifying plausible causal relationships among inputs, activities, and the expected outputs, outcomes, and development impacts and assumptions.

⁸⁵ See Annex 1 and paragraph 4.08 of the 2017 ETPS.

The Review focused on identifying CDB influence at the level of capacity changes. The ETPS is expected to contribute directly to this level of change. Given the stage of implementation of individual initiatives, the team expected to find more results data at this level. However, the Review also captured, when feasible, any emerging evidence of behaviour change (sustained application of changes in policy and practice).

Exhibit II. i Notion of a “ripple effect”



The fundamental premise of the ETPS and its anticipated contributions to the education and training sector is that **IF** CDB engages with and supports targeted individuals, organisations and institutions in BMCs and regional entities through its activities, **THEN** CDB directly contributes to strengthening capacity in BMCs and regional entities and through that it will indirectly contribute to changes in behaviours (including institutional practices), as a means to bring about improvements to education systems and finally, positive impacts on the lives of people in the Caribbean at large.

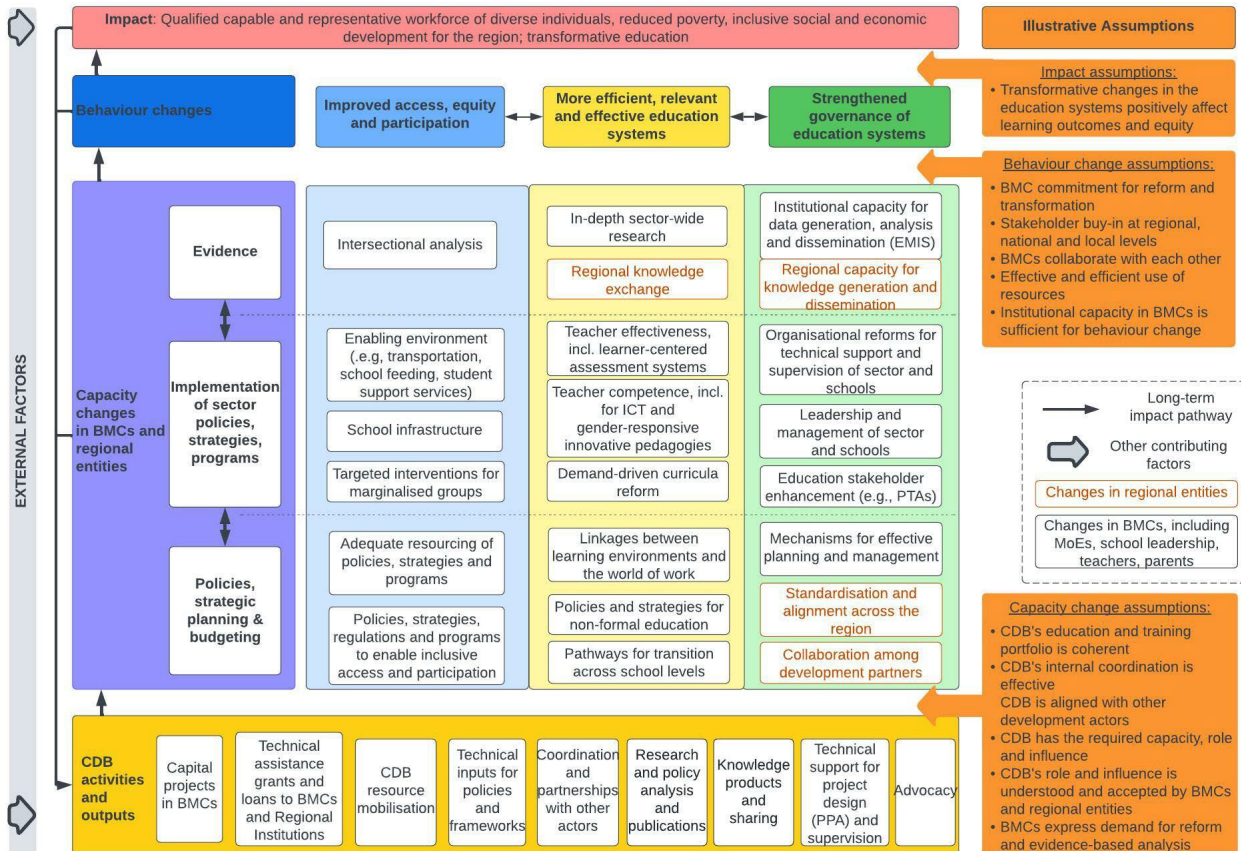
The working TOC for the ETPS Review is presented in *Exhibit II. ii*. The TOC identifies key elements at each level of the change process as they relate to the three objectives of the ETPS, namely a) access, equity and participation, b) efficiency, relevance and effectiveness (or quality of education); and c) governance. The TOC identifies areas of change in BMCs and/or regional entities (e.g., OECS, CARICOM, UWI) related to these objectives. The key elements at each level of change (from bottom to top of the visual) include:

- **CDB implements key activities** targeted at strengthening education systems. The activities listed are illustrative examples drawing on preliminary document review and consultations during the inception phase and will be probed and further refined during the next phase of this assignment.
- CDB activities contribute to **capacity changes in BMCs and regional entities** in three core building blocks of education systems: a) policies, strategic planning and budgeting; b) implementation of sector

policies, strategies and programs; and c) evidence gathering and use, including in M&E. The TOC includes examples of areas of capacity change that were anticipated in the ETPS.

- Changes in capacity in BMCs and regional entities are expected to lead to **longer-term behaviour changes** within the three objectives of the ETPS, that is, there are improvements in access, equity and participation in education, in the quality of education and in education governance. Changes at this level ultimately result in the desired impact in the region.

Exhibit II. ii Working TOC for the ETPS Review



Key logical assumptions may explicitly or implicitly underlie the ETPS. Assumptions are conditions that must be in place in CDB and externally for the outlined change processes to work. The working TOC includes **illustrative assumptions** in the exhibit above; they are not exhaustive. The TOC also reflects the external factors, such as natural disasters, COVID-19 pandemic, and economic shocks, which can further influence CDB activities and change at different levels.

Future use: The TOC can be used as a tool for results management communication for the ETPS. The examples of capacity change included in the TOC diagram are expressed in terms of aspirations in the ETPS. A reconstructed TOC that has been verified with stakeholders can be used as the basis for assessing actual progress made in different areas of capacity change and identifying the likely contributions made to this progress by the CDB. When change has not happened as aspired, the TOC can help reflections on why change has not happened.

Review Framework

The Review was guided by a Review Matrix, which identifies key questions, sub-questions, illustrative indicators, and the anticipated sources of data and data collection methods. The Review addressed questions on the performance of the ETPS, including its portfolio of investment projects and TA, and the CDB’s non-financial interventions to support the ETPS. See *Table II. i* for an overview of the key questions. The full Review Matrix is provided in *APPENDIX 4*

Table II. i Overview of the Review Questions

AREA OF INQUIRY	QUESTIONS
Relevance	How appropriate and responsive is the ETPS design given evolving needs, policies, priorities and lessons learned about education and training in national, regional, sub-regional, and global contexts? <ul style="list-style-type: none"> • Relevant to national and regional stakeholders • Aligned with other CDB policies • 21st century challenges, imperatives and lessons?⁸⁶
Effectiveness and Sustainability	How effective is the ETPS in achieving its three objectives? <ul style="list-style-type: none"> • Contributions to capacity change in each of the three objective areas (as per the ToC) • Are capacity changes in BMCs and regional institutions likely to be sustained?
Factors Affecting Performance	What are the key factors affecting the performance of the ETPS? <ul style="list-style-type: none"> – Exogenous factors (national, regional, global), including BMC capacities – Internal CDB systems and other capacities – CDB leverage of its reputation and strategic role in the sector
Lessons Learned	What lessons can be drawn from the Review findings about the relevance, effectiveness and sustainability of the results of ETPS investments, in order to enhance future programming?
Recommendations	What recommendations can be made to improve the design, implementation, management and M&E of the existing and prospective ETPS portfolio? What recommendations can be made regarding the strategic role of the CDB in the education and training sector?

Method

The Review team used qualitative methods in the ETPS review, drawing from secondary data found in documents and generating primary data through individual and group interviews. The review did not involve any surveys or site visits for observations. The team used two overall framings to help answer the Review questions:

- Illustrative cases to provide a more in-depth review of work in certain priority areas of the ETPS that required sampling a number of BMCs and regional initiatives that are relevant to the different case study streams.

⁸⁶ 21st century challenges and imperatives include digitization, equity and gender equality, life-long learning, and curriculum that reflects that 21st century skills.

- Broad-based review encompassed the portfolio review, regional stakeholder consultations, and all interviews with all BMCs, in order to provide sufficient breadth to data collection.

The following sub-sections describe methods in greater detail:

ILLUSTRATIVE CASE STUDIES

The Review team developed ‘illustrative cases’ of priority areas within the ETPS, including education sub-sectors and cross-cutting themes. An illustrative case study is descriptive in character and intended to add realism and in-depth examples to support the Review findings. They were used for a more in-depth exploration of core areas of CDB’s work in the education and training sector, by dedicating resources for broader consultations with key stakeholders relevant to the thematic cases at country and regional levels. The cases were used to examine the performance of ETPS as per the reconstructed TOC and to understand how various elements in the TOC converge to produce observed changes and results in a defined area. The cases provide illustrative examples of capacity changes and emerging behaviour changes being achieved. The cases were not intended to be seen as siloes and integrated other priority areas of the ETPS. For instance, a case study of a sub-sector was informed from the perspective of life-long learning, looking at education and training opportunities on a continuum, and also considered equity dimensions. In addition, the cases have a forward-looking dimension in that they also identify new challenges in the area.

In the purposive selection of the illustrative case studies, the Review team considered:

1. Level of financial investment committed in the area (through investment or TA projects) and/or a cluster of non-financial activities that will potentially inform lessons of value to any update of the ETPS.
2. Potential to enable learning about capacity changes, success factors, design assumptions and risk factors across the ETPS objectives.
3. Inclusion of a range activities identified in the TOC and different types of implementing agencies and beneficiaries involved in ETPS activities.
4. Priority given to the areas by CDB stakeholders.

CASE SELECTION

The Team considered the potential for illustrative cases in: Early Childhood Education (ECE), Basic Education, Post-secondary/Tertiary Education, TVET, and SEN. These areas were assessed using six criteria as seen in the table below. The criteria indicate that basic education, post-secondary/tertiary education and TVET, SEN were the areas involving the largest number of BMCs, regional projects and the most investment. Other areas of interest identified during the inception phase, including GE in education, education sector governance, and knowledge production/sharing, were covered within these illustrative cases and as part of the broad-based review.

Table II. ii Criteria considered in prioritizing illustrative cases

	ECD	BASIC EDUCATION	POST-SECONDARY/TVET	SEN
1. No. of interviewees who referenced this area	0	2	1	2
2. No. of BMCs with country-specific projects with focus on this area	0	5	4	2

3. No. of BMC Projects	0	5	7	4
4. No. of regional activities	6	7	7	2
5. No. of regional entities	0	1	3	1
6. Financial resources committed	646k	52m	17.5m	information not available

There were several limitations in making this assessment. As noted above, several projects may have multiple components and our portfolio data does not illustrate the full extent of investment in cross-cutting areas such as gender equality, SEN, and sector governance within BMC investment projects.

Based on this preliminary review, the evaluation team recommended selecting three illustrative cases, as illustrated in *Table II. iii*.

Table II. iii Proposed illustrative cases

EMPHASIS	RATIONALE	COVERAGE
CDB support for Basic Education	The case will cover support for primary and secondary education under the 2017 ETPS and will consider types of contributions under each of the three ETPS objective areas, including the more recent evolution of CDB support in this area.	5 projects in 5 countries (Grenada, Haiti, St Vincent and the Grenadines (SVG), Antigua and Barbuda, St. Kitts and Nevis) 7 regional activities COVID-19 response (including “Let’s REAP”) and digitalisation measures
CDB support for post-secondary education, especially through TVET	Given that TVET covers secondary and post-secondary education, the Review will look at TVET on an education continuum. As such, TVET interventions will be assessed in relation to broader CDB’s efforts in secondary and post-secondary education. TVET has been a core area of CDB support prior to and under the 2017 ETPS. TVET has been part of efforts to ensure alignment of education systems with workforce requirements. Partnership with private sector is an important dimension in this area. TVET is part of the Bank’s Regional Cooperation Initiative programming.	7 projects in 4 countries (Grenada, Guyana, SVG, Antigua and Barbuda) Regional activity involving regional organisations and other BMCs COVID-19 response and adaptation (Framework for the Re-opening of schools) Select secondary and post-secondary interventions that link to the principles of a continuum and to the specific initiatives in TVET.
CDB support for Special education needs (SEN) across sub-sectors	Although it is only one dimension of equity, there have been specific (albeit fewer) investments in this area, and this was identified as a gap by CDB. Support in this area has intensified in the past couple of years. CDB is conducting a study of the SEN in the region and developing a model special educational needs policy and strategy. For the Bank, this is a key group to consider in from equity perspective.	4 project in 2 country (Grenada, Guyana) and 2 regional projects. COVID-response initiatives have given more emphasis to SEN COVID-19 response (including “Let’s REAP”) and digitalisation measures

The illustrative case studies all draw on the same type of data collection methods, described below.

CONSULTATIONS WITH BMCs IN ILLUSTRATIVE CASE STUDIES

The definition of illustrative cases required more in-depth consultation in certain BMCs that implemented investment or TA projects. The list of countries includes primarily Group 2 and Group 3 countries⁸⁷ and includes a mix of smaller and larger BMCs. In the illustrative case studies, country-level interviews complemented consultations with stakeholders at the regional level.

Table II. iv Sample of BMCs for illustrative areas

COUNTRIES	INTERVIEWS	FOCUS
Grenada, Guyana, Haiti, St Vincent and the Grenadines, and Antigua and Barbuda	Up to 6 interviews, including the Chief Education officer Other interviewees related investment and TA projects National teachers' union and, where relevant and feasible, a group discussion with a small number of teachers or principals Other development partners	Broad-based Review questions related to relevance, effectiveness, enabling and inhibiting factors and the role of CDB. Explore relevant illustrative cases through the projects implemented in the BMCs and the contributions of regional initiatives

The illustrative cases did not result in separate deliverables. The team collated data and prepared internal working documents that capture both backward and forward-looking dimensions and included:

- Evolution of CDB support/strategies in the area (especially since 2020);
- Identification of types of activities being supported, types of capacity changes taking place in the sector in BMCs, other actors providing support, and areas where there is greatest evidence of CDB contribution;
- Identification of links between regional initiatives and BMC-focused projects;
- Identification of efforts to mainstream equity and gender dimensions in the area;
- Identification of areas of progress, key factors affecting performance, any differences across countries, and
- Key considerations for the future role of CDB and its programming in these areas.

Broad-based review

The broad-based review collated and analysed data for all of the Review questions and included a review of the portfolio, other document review, consultations with key stakeholders across BMCs, and consultations with stakeholders at a regional level.

REVIEW OF PORTFOLIO DATA

The team mapped out the ETPS portfolio at hand, in terms of investment size, maturity, type, country and regional distribution, and education sub-sector foci. During the data collection phase, the team drew primarily on Appraisal Reports to further characterize the nature of investments by: a) mapping projects against the ETPS objectives; b) identifying the types of education system capacities being addressed, including infrastructure, teacher effectiveness and curriculum development, building an evidence base, etc; and c)

⁸⁷ As per Country Groups and Terms of Lending for SDF 10. CDB, *Resolution of Contributors to SDF 10*, p. 35

examining the GE dimensions, the SEN dimensions, the climate resilience dimensions, and the digitalisation dimensions in each of the projects.⁸⁸ This additional mapping informed Review questions on the extent to which the portfolio is coherent and aligned with ETPS strategic goals, including the extent to which initiatives at country and regional levels are linked and mutually reinforcing. It also informed the analysis of alignment with other CDB policies.

CONSULTATIONS WITH BROADER SET OF BMCs

The consultations with regional and BMC stakeholders are outlined below in the section on Data Collection. While the Review Team did cover all 19 BMCs, it was not able to cover all 19 with similar depth and, therefore, as noted above, conducted “deeper dives” with five countries in illustrative cases. At the same time, having the perspective of a range of BMCs was critical to ensure that the Review has taken into account the contributions of regional initiatives and the diverse types of demands and expectations for CDB support to the education sector for the future. It was also important that the Review consider inputs from BMCs that are at different stages in reforming the education system and adjusting to challenges of COVID-19. Thus, as part of the broad-based review, we conducted virtual interviews and group discussions with the Chief Education Officer and Education Sector planners across the 19 BMCs.

Data Collection

This section provides further detail on the type of data to inform the review and how it was collected. Each type of data and method for collection was used to support both illustrative cases and a broad-based review.

Document Review

The team reviewed a wide range of documents relevant to the ETPS, CDB project investments and non-financial interventions, the strategic context for investments, and the development context for the education and training sector in the region. Document review was guided by the questions in the review matrix and examined the following types of documents:

- **CDB corporate documents**, including Strategic Plans (2015-2019, 2020-2024 and 2022-2024 Update), ARPPs, DERs, Annual Reports, and SDF 10 replenishment reports.
- **CDB sector documents**, including the Education and Training Policy and Strategy (2017), Gender Equality Policy and Strategy (GEPOS 2020-2024), 2021 Disaster Risk Management Strategy and Operational Guidelines (DIMSOG), the Climate Resilience Strategy (2019-2024), 2016 Private Sector Development Strategy and the 2020 Youth Policy and Operational Strategy.
- **CDB evaluations and reviews**, including evaluations and reviews of the Basic Needs Trust Fund, Special Development Fund, CDB’s GEPOS (2018), CDB’s DIMSOG (2018), CDB’s Approach to MfDR (2021), and CDB Technical Assistance (2021), and the OECS Country Strategy Paper (CSP) cluster evaluation (2018).
- **CDB portfolio documentation**, including 26 TA and investment projects approved in 2017-2022, plus key TVET projects from 2016
- **CDB country strategies**, including Country Engagement Strategies, aide memoires, Country Strategy Programme Evaluations (CSPEs), country strategy completion reports, when available.
- **BMC-focused documentation**: In the countries identified for illustrative cases, this included relevant documents, studies and reports shared by stakeholders in BMCs.

⁸⁸ For instance, the team will draw on the ETPS (Appendix II) and the CDB’s Sector Note on gender mainstreaming in the education sector to inform the Review in this area.

- **Publications and strategies from partners in the education sector**, including relevant strategies, research studies and evaluations by regional institutions, such as CARICOM Secretariat, OECS Commission, and by CDB's multilateral development partners, such as GPE, ILO, and UNESCO.

See [APPENDIX 5](#) for a comprehensive list of the documents reviewed.

Stakeholder consultations

The review team carried out individual and group interviews with 105 stakeholders in the CDB, BMCs, regional and sub-regional institutions, and development partners. The Review team worked with the CDB to identify a purposeful sample of knowledgeable stakeholders to interview using principles of adequate coverage of the Review questions, appropriate representation of different regional BMC contexts and illustrative case studies, and the review budget for data collection.

Within this coverage, the team ensured that different sub-groups, such as teachers, principals and youth or those speaking about different illustrative cases (Basic Education, SEN, post-secondary education, especially TVET), and cross-cutting priorities such as gender or social group inclusion, were represented. Our experts in the education field provided guidance in building up a relevant list of respondents.

These interviews were guided by interview protocols developed as part of the final draft of the Inception Report. All consultations were conducted virtually. The review team conducted individual interviews and, whenever feasible, group interviews or focus group discussions, in particular with Chief Education Officers and Education Sector Planners in order to cover a large number of BMCs.

Table II. v Stakeholder consultations

CATEGORY OF STAKEHOLDER	TYPES OF GROUPS OR ORGANISATIONS INCLUDED	NUMBER OF INTERVIEWS
CDB Stakeholders	<ul style="list-style-type: none"> • Social Sector Division, including Operations Officers, Gender Specialists, Portfolio Managers and Division Chief • Economics Department, including Country Economists • Select staff from other Divisions • Senior and mid-level Management, e.g., Director of Projects, VPO • Board Members 	12 interviews
National level Stakeholders	All 19 BMCs: <ul style="list-style-type: none"> • Chief Education Officer and Education Sector Planners BMCs of greatest relevance for illustrative cases (5 BMCs): <ul style="list-style-type: none"> • Chief Education Officer • Executing Agencies, Project Implementation Units • Ministry of Social Development/Bureau of Gender Affairs, Ministry of Labour • National teachers unions • Principals • private sector representative in case of TVET 	58 interviews
Regional Stakeholders	<ul style="list-style-type: none"> • Regional organisations, e.g., CARICOM Secretariat, OECS Commission, Caribbean Association of National Training Authorities (CANTA), Caribbean Union of Teachers, Caribbean Association of Principals of Secondary Schools (CAPSS), CARICOM Youth Ambassadors, Caribbean Chambers of Commerce (CARICHAM) 	17 interviews

CATEGORY OF STAKEHOLDER	TYPES OF GROUPS OR ORGANISATIONS INCLUDED	NUMBER OF INTERVIEWS
	<ul style="list-style-type: none"> Education organisations, e.g., CXC, UWI INMED Partnerships for Children 	
Development partners in the education sector	<ul style="list-style-type: none"> IFIs: IDB Other multilateral organisations in education sector: UNESCO, GPE, ILO Other development partners: e.g., EU, Canada, UK 	9 interviews

Data Analysis

OVERALL APPROACH

To maximize the quality of data and mitigate the risks and constraints inherent in each individual data collection tool, the Review team used several processes to check and clean the data. These included: (i) the individual leading the interview reviewed written interview notes immediately after the conversation to identify areas requiring clarification or follow; (ii) document/desk study data was excerpted as much as possible directly from the sources to ensure accuracy; (iii) data aggregation was guided by the Review matrix and quality controlled by the Team Leader. The Review team gathered at regular intervals for analysis meetings (via MS Teams or other platforms) to discuss and cross-reference the results of each line of inquiry, identify patterns and outliers, and start drafting emerging summary findings in response to the Review questions and sub-questions. To analyse data, the Review team employed primarily qualitative (descriptive, content, comparative) and quantitative techniques.

- The team used **descriptive analysis** to describe the internal and external contexts of the ETPS, including its institutional arrangements and activities to support implementation. This created a taxonomy of different types of ETPS activities as understood by CDB in its work at regional and country levels. The team also used this approach to describe key elements characterising equivalent policies or strategies of development partners in the region. Descriptive analysis was the initial step, before moving on to more interpretative approaches.
- **Content analysis** constituted the core of the qualitative analysis. As part of its content analysis, the team developed a framework for coding and analysing all interview data and for document review. The framework was closely aligned with the Review matrix and enabled both within-case analysis and analysis that cut across different sub-sectors and themes. The team used a qualitative data analysis software, Dedoose, to help quantify the qualitative data deriving from interviews, and to allow the team to identify trends by respondent or stakeholder groups. Emerging issues and trends in these data constituted the raw material for crafting preliminary observations that were subsequently refined to feed into the draft and final reports.
- **Quantitative analysis/descriptive statistics** were used to interpret quantitative data from the portfolio using Excel. Some degree of quantitative analysis also occurred in analysing results for qualitative data (see Dedoose below). In general, because the data set consisted primarily of qualitative data, the evaluation team did not anticipate the need for a high level of statistical analysis.
- **Qualitative data analysis:** The evaluation team used Dedoose, a software that allows multiple users to engage in the analysis of qualitative data. Dedoose allows for the storage and integrated analysis of data deriving from the Review's different lines of inquiry and identify correlations. The software facilitates the coding of different media (interview notes, documents of all kinds, etc.) to enable the analysis of this material in thematically- specific ways and according to various descriptors (e.g., by

stakeholder type, by country, by gender, etc.). The use of Dedoose also allowed for converting qualitative interview data into some quantitative content analysis (e.g., frequency of codes).

- **Comparative analysis** was used to study and contrast findings emerging from different thematic case, different BMCs, types of illustrative results, types of projects or initiatives, and stakeholder groups. To the extent possible, the Review team compared/contrasted the approaches of CDB and the other development partners in the education sector considered as part of this Review.

Overall, the Review sought to improve reliability of information and to increase the quality, integrity and credibility of the Review findings and conclusions through the triangulation of data. The Review team attempted – to the greatest extent possible – to base individual findings on several lines of inquiry and data sources.

APPENDIX 4 REVIEW MATRIX

ELEMENTS	KEY QUESTIONS	SUB-QUESTIONS	ILLUSTRATIVE INDICATORS	CORRESPONDING SOURCES OF DATA	DATA COLLECTION METHOD
Relevance	1. How appropriate and responsive is the ETPS design given evolving needs, policies, priorities and lessons learned about education and training in national, regional, sub-regional, and global contexts?	1.1 To what extent are the objectives and priorities of the ETPS relevant to national, regional and sub-regional stakeholders?	<ul style="list-style-type: none"> Alignment of ETPS objectives and priorities with the education and training priorities of BMC stakeholders and regional and sub-regional partners Degree of BMC awareness of ETPS objectives and priorities Alignment of ETPS objectives and priorities with perceived gaps in national education systems, including remaining inequities 	<ul style="list-style-type: none"> Relevant research and publications on the education and training sector in region ETPS documents and theory of change Regional and sub-regional frameworks⁸⁹ BMC stakeholders⁹⁰ Country Engagement Strategies⁹¹ CDB country economists, SSD, RCI, etc. Regional and sub-regional partners⁹² Development partners⁹³ 	<ul style="list-style-type: none"> Document review Interviews Thematic cases
		1.2 To what extent is the ETPS portfolio aligned with other CDB policies?	<ul style="list-style-type: none"> Alignment of ETPS priorities with other CDB policy priorities Evidence of CDB policy priorities in design of ETPS financial investments and non-financial interventions Extent to which ETPS financial investments and non-financial interventions evolved to 	<ul style="list-style-type: none"> CDB SPU and SDF documents CDB policies for gender, climate change, TA, etc. CDB country economists, SSD, CDB staff and management 	<ul style="list-style-type: none"> Document review Interviews Illustrative cases

⁸⁹ Regional and sub-regional frameworks include *inter alia* Guidelines for developing policy, Regulations and Standards in ECD Services, OECS Education Sector Strategy 2012-2021, Regional TVET Strategy, Standards of Practice for the Teaching Profession in CARICOM

⁹⁰ BMC or national stakeholders include BMC government officials, executing agencies, project implementation units, other partners.

⁹¹ CSPs for Suriname, Grenada, Belize, Jamaica, St Vincent and the Grenadines, and Haiti

⁹² Regional and sub-regional partners include CARICOM Secretariat, OECS Secretariat, UWI, etc.

⁹³ Development partners include UNESCO, IDB, USAID, EU, GPE

REVIEW OF CDB'S EDUCATION AND TRAINING POLICY AND STRATEGY

ELEMENTS	KEY QUESTIONS	SUB-QUESTIONS	ILLUSTRATIVE INDICATORS	CORRESPONDING SOURCES OF DATA	DATA COLLECTION METHOD
			respond to SPU and SDF priorities ⁹⁴ <ul style="list-style-type: none"> Alignment of thematic case investments with ETPS and other CDB policies⁹⁵ 		
		1.3 To what extent is the ETPS responding to 21 st century challenges, imperatives and lessons? ⁹⁶	<ul style="list-style-type: none"> Alignment of ETPS priorities with challenges and imperatives in global frameworks⁹⁷ Size and types of ETPS financial and non-financial interventions in 21st century challenges and imperatives Degree of satisfaction of BMCs with CDB's support to education sectors facing 21st century challenges 	<ul style="list-style-type: none"> ETPS and portfolio documentation Global frameworks CDB SSD, country economists, senior management Development partners BMC activity participants BMC officials, representatives Implementing agencies 	<ul style="list-style-type: none"> Document review Interviews Illustrative cases
Effectiveness and Sustainability	2. How effective was the ETPS in achieving its objectives?	2.1 To what extent is the ETPS developing the capacity needed to improve access, equity and participation in education and training systems in BMCs?	<ul style="list-style-type: none"> Extent of progress towards expected results under objective 1 of the ETPS⁹⁸ Extent to which ETPS has addressed or targeted SEN, language issues and socio-economic and attitudinal barriers impeding/reducing access and participation Extent to which ETPS has addressed gender concerns and 	<ul style="list-style-type: none"> CDB Gender Equality Policy and Strategy, and related guidance documents CDB SSD, country economists, senior management, staff CDB gender specialists BMC officials, representatives BMC activity participants Regional and sub-regional institutions 	<ul style="list-style-type: none"> Document review Interviews Illustrative cases

⁹⁴ SPU and SDF priorities include COVID-19 challenges, etc.

⁹⁵ Other CDB policies include GEPOS, climate, youth-related, disability related, etc.

⁹⁶ 21st century challenges and imperatives include digitalisation, equity, and gender equality, life-long learning and 21st century skills.

⁹⁷ Global frameworks include Sustainable Development Goals (SDG), UNESCO TVET Strategy 2010-2015, UNESCO Education Strategy 2014-2021

⁹⁸ The Review will look at indicators outlined under objective 1 of the partial results framework of the ETPS (see Appendix 1).

ELEMENTS	KEY QUESTIONS	SUB-QUESTIONS	ILLUSTRATIVE INDICATORS	CORRESPONDING SOURCES OF DATA	DATA COLLECTION METHOD
			<p>barriers to access and participation</p> <ul style="list-style-type: none"> Evidence of ETPS contributing to increased BMC capacity to prioritize, plan, resource, implement, monitor and improve access, equity and participation in education and training Trends in reasons (factors) for over or under-achieving planned capacity changes 	<ul style="list-style-type: none"> Development partners Implementing agencies Reporting on country strategies Project reporting SDF reporting DERs, Annual reports 	
		2.2 To what extent is the ETPS developing capacity for more equitable, effective, relevant and efficient education and training systems in BMCs?	<ul style="list-style-type: none"> Progress towards expected results under objective 2 of the ETPS⁹⁹ Evidence of ETPS contributions to BMCs and regional entities adopting approaches that target equity challenges and gender inequalities that affect education systems Evidence of ETPS contributions to BMCs and regional entities adopting approaches to skills developments that reflect labour market needs. 	<ul style="list-style-type: none"> CDB SSD, country economists, senior management, staff BMC officials, representatives BMC activity participants Regional and sub-regional institutions Development partners Implementing agencies Reporting on country strategies SDF reporting DERs, Annual reports Project reporting 	<ul style="list-style-type: none"> Document review Interviews Illustrative cases

⁹⁹ The Review will look at indicators outlined under objective 2 of the partial results framework of the ETPS (see Appendix 1).

REVIEW OF CDB'S EDUCATION AND TRAINING POLICY AND STRATEGY

ELEMENTS	KEY QUESTIONS	SUB-QUESTIONS	ILLUSTRATIVE INDICATORS	CORRESPONDING SOURCES OF DATA	DATA COLLECTION METHOD
		<p>2.3 To what extent is the ETPS developing capacity to strengthen the governance of education and training systems in BMCs, including a focus on gender and equity?</p>	<ul style="list-style-type: none"> • Progress towards expected results under objective 3 of the ETPS¹⁰⁰ • Evidence of ETPS contributions to strengthened BMCs and regional entities' capacity to reform and manage education systems • Evidence of ETPS contributions to capacity of BMCs and regional entities to integrate equity and gender considerations in education sector governance 	<ul style="list-style-type: none"> • CDB SSD, country economists, senior management, staff • BMC officials, representatives • BMC activity participants • Regional and sub-regional institutions • Development partners • Implementing agencies • Reporting on country strategies • Project reporting • SDF reporting • DERs, Annual reports 	<ul style="list-style-type: none"> • Document review • Interviews • Illustrative cases
		<p>2.4 Are the capacity changes in BMCs and regional entities likely to be sustained?</p>	<ul style="list-style-type: none"> • Evidence of sufficient political, social, economic and technological support for capacity changes inside BMCs • Evidence of BMCs and regional entities implementing measures to retain or disseminate acquired knowledge or tools • % of respondents who report that they use acquired knowledge or tools in their work • Investments with greatest evidence of sustainable capacity change 	<ul style="list-style-type: none"> • CDB SSD, country economists, senior management, staff • BMC officials, representatives • BMC activity participants • Regional and sub-regional institutions • Development partners • Implementing agencies • Reporting on country strategies • SDF reporting • DERs, Annual reports 	<ul style="list-style-type: none"> • Document review • Interviews • Illustrative cases

¹⁰⁰ The Review will look at indicators outlined under objective 3 of the partial results framework of the ETPS (see Appendix 1).

ELEMENTS	KEY QUESTIONS	SUB-QUESTIONS	ILLUSTRATIVE INDICATORS	CORRESPONDING SOURCES OF DATA	DATA COLLECTION METHOD
Factors affecting ETPS performance	3. What are the key factors affecting the performance of the ETPS?	3.1 How have exogenous factors in global, regional, national and institutional contexts facilitated or hindered capacity and behaviour change?	<ul style="list-style-type: none"> • Frequency with which social, economic, political, security, environmental and other exogenous factors¹⁰¹ affect ETPS performance • Evidence of the effects of COVID-19 pandemic and other exogenous factors, including climate change challenges on ETPS performance • Evidence of institutional issues affecting results achievement • Examples of measures¹⁰² taken by CDB and BMCs to respond to exogenous events and institutional capacity issues • Degree of satisfaction of stakeholders with CDB's support to education sectors facing COVID-19, climate change challenges and exogenous factors 	<ul style="list-style-type: none"> • CDB SPU, SDF documents • CDB Climate Resilience Strategy, DIMSOG • Country strategies • Project documentation • CDB SSD, country economists, senior management, staff • CDB climate change specialists • BMC officials, representatives • BMC activity participants • Regional and sub-regional institutions • Development partners • Implementing agencies • Project reporting 	<ul style="list-style-type: none"> • Document review • Interviews • Illustrative cases
		3.2 How are internal capacity and CDB systems affecting the relevance, effectiveness, and sustainability of the ETPS and the CDB performing its role?	<ul style="list-style-type: none"> • Extent to which CDB enhanced its internal coordination of ETPS • Evidence of increase/decrease in CDB resource mobilization from private and public sources under the ETPS 	<ul style="list-style-type: none"> • Past evaluations and reviews with insights on CDB internal capacities and systems • CDB corporate strategies, policies, transformation agenda • CDB BOD members • CDB senior and mid-level management 	<ul style="list-style-type: none"> • Document review • Interviews • Focus groups

¹⁰¹ Exogenous factors include COVID 19 pandemic, natural disasters and social, economic, political, security and environmental factors and shocks, including climate change challenges

¹⁰² Measures include (1) enhancing BMC knowledge and awareness of issues, (2) conducting research to use in evidence-based policy development, (3) supporting implementation of policies and strategies that emphasize facing challenges, (4) providing resilient education infrastructure, and providing tools.

REVIEW OF CDB'S EDUCATION AND TRAINING POLICY AND STRATEGY

ELEMENTS	KEY QUESTIONS	SUB-QUESTIONS	ILLUSTRATIVE INDICATORS	CORRESPONDING SOURCES OF DATA	DATA COLLECTION METHOD
			<ul style="list-style-type: none"> • Levels of allocated financial resources to education and training initiatives • Allocation of human resources commensurate with objectives of the ETPS/ambitions for the sector • Effectiveness of planning (PPA), programming and M&E tools, instruments and approaches • Effectiveness of communication and coordination management and partnership management systems 	<ul style="list-style-type: none"> • CDB operations staff 	
		<p>3.3 To what extent is CDB leveraging its reputation and strategic role in the education and training sector to enhance ETPS performance?</p>	<ul style="list-style-type: none"> • Extent to which CDB expanded its partnerships to support ETPS • Extent to which CDB complements, coordinates, cooperates and/or collaborates with development partners, private sector, and other players in education sector • Extent to which CDB shapes policy dialogue and priority setting in sector • % of respondents who say CDB's role in knowledge generation and sharing in the sector is clear/appropriate • Extent to which CDB is perceived to have the right products/tools to support BMCs (including PPA) 	<ul style="list-style-type: none"> • CDB SSD, country economists, senior management, staff • BMC officials, representatives • Regional and sub-regional institutions • Development partners 	<ul style="list-style-type: none"> • Interviews • Illustrative cases

ELEMENTS	KEY QUESTIONS	SUB-QUESTIONS	ILLUSTRATIVE INDICATORS	CORRESPONDING SOURCES OF DATA	DATA COLLECTION METHOD
			<ul style="list-style-type: none"> Perception of stakeholders, including BMCs, of CDB's comparative strengths, niche and added value in education sector Degree of satisfaction of BMCs with CDB's support to education sector 		

Lessons and Recommendations	4. What are the lessons learned and the recommendations to make about the design and implementation of the ETPS to enhance its contribution to future programming?	4.1 What lessons can be drawn from the review findings about the relevance, effectiveness and sustainability of the results of ETPS investments?			
		4.2 What lessons can be drawn from the review findings about future programming in the education and training sector?			
		4.3 What recommendations can be made to improve the design, implementation, management and M&E of the current and prospective ETPS portfolio?			
		4.4 What recommendations can be made regarding the strategic role of the CDB in the education and training sector?			

APPENDIX 5 DOCUMENTS REVIEWED

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APPENDIX 6 INTERVIEW PROTOCOLS

The following provides interview protocols for key stakeholder groups at CDB, in BMCs and regional entities. The protocols were tailored to individual stakeholders prior to consultations.

GENERAL GUIDELINES

Make introductions, explain the evaluation purpose and use of information, assure the respondent of the confidentiality (not attributing any comments to a specific individual), and ask the respondent how much time s/he has available. Ask for consent for conducting the interview. As a semi-structured interview, questions can be tailored to the evaluation theme and no particular order is required, however, it is important to capture priority areas in the interview. If it is not possible to cover all questions, suggest follow up steps (such as an email, phone call or another interview) or alternately identify another source of information.

Interview Protocol: CDB staff¹⁰³

GENERAL CHARACTERISTICS:

1. What is your position and major responsibilities within CDB?
2. How long have you been in this position?

RELEVANCE:

3. What do you consider to be the main education and training needs in the Caribbean region? *[possible prompts: 21st century challenges and imperatives, such as digitalisation, equity, gender equality, life-long learning, 21st century skills]*
4. How has CDB's work in the education and training sector evolved in the last years? *[possible prompts: alignment with other CDB policy priorities, SDF priorities and the 2022-2024 SPU]*

EFFECTIVENESS AND SUSTAINABILITY:

5. What do you consider to be the main contributions of the Bank to the sector at regional, sub-regional and/or BMC level? *[possible prompts: contribution to building capacity in the three ETPS objectives and cross-cutting areas, including gender equality, SEN, equity, digitalisation]*
6. What are the areas where the Bank could do better? What would be required for the Bank to perform better certain areas?
7. Apart from its financial support, what has been the contribution of CDB's non-financial support in recent years (policy dialogue, partnership, and other initiatives)?

FACTORS AFFECTING ETPS PERFORMANCE:

8. What are the main factors external to CDB that facilitate or hinder ETPS performance (e.g., global, regional, national, institutional contexts)? *[possible prompts: COVID-19, climate change, institutional capacity in BMCs]*
9. What are examples of measures taken by CDB and BMCs to respond to exogenous events and institutional capacity issues?
10. How has CDB's internal capacity to support the education and training sector evolved? *[possible prompts: internal coordination and communication, human resource allocation, planning, programming and M&E tools, instruments and approaches]*

¹⁰³ A selection of these questions will also be used for focus group discussions.

11. To what extent is CDB's work in education and training aligned with other stakeholders' efforts (e.g., collaboration and coordination with regional entities, bilateral and multilateral development partners)? What kinds of partnerships has CDB engaged in within the context of the ETPS?
12. What do you consider to be CDB's comparative strength in relation to other actors in the region?

MOVING FORWARD:

13. Moving forward, where do you see CDB's strategic role in the education and training sector? What are the key priority areas in the sector that CDB should focus on?
14. What kind of changes would be required for CDB to perform that role?

Interview Protocol: BMC Chief Education Officers¹⁰⁴

GENERAL CHARACTERISTICS:

1. How long have you been in this position and what are your main responsibilities?
2. In what ways have you been engaged with CDB? What types of CDB projects are you implicated in?

RELEVANCE:

3. What do you consider to be the main education and training needs in the Caribbean region/in your country? [*possible prompts: 21st century challenges and imperatives, such as digitalisation, equity, gender equality, life-long learning, 21st century skills*]
4. To what extent has CDB's work in the education and training sector been aligned with your country's priorities? [*possible prompts: alignment of ETPS priorities with BMC needs and priorities; relevance of size and types of ETPS financial and non-financial interventions to BMC needs and priorities*]

EFFECTIVENESS AND SUSTAINABILITY:

5. What do you consider to be the main contributions of the Bank to the sector at regional, sub-regional and/or BMC level? [*possible prompts: contribution to building capacity in the three ETPS objectives and cross-cutting areas, including gender equality, SEN, equity, digitalisation*]
6. What have the 2-3 most critical changes in capacity that have taken place in the sector in your country? (Prompt to understand if CDB indirect or direct support contributed in some way and to understand what other development partners provided support in this area.) To what extent are these capacity changes sustained (likely to be sustained) in your country? [*possible prompts: Is there sufficient political, social, economic and technological support for capacity changes inside BMCs?*]
7. What are the areas where the Bank could do better? What would be required for the Bank to perform better certain areas?
8. Apart from its financial support, what has been the contribution of CDB's non-financial support in recent years (policy dialogue, partnership, and other initiatives)?

¹⁰⁴ Covers all 19 BMCs

FACTORS AFFECTING ETPS PERFORMANCE:

9. What are the main factors that facilitate or hinder ETPS performance (e.g., global, regional, national, institutional contexts)? *[possible prompts: COVID-19, climate change, institutional capacity in BMCs]*
10. What are examples of measures taken by CDB and/or your country to respond to exogenous events and institutional capacity issues?
11. To what extent is CDB's work in education and training aligned with other stakeholders' efforts (e.g., collaboration and coordination with regional entities, bilateral and multilateral development partners)? What kinds of partnerships has CDB engaged in within the context of the ETPS?
12. What do you consider to be CDB's comparative strength in relation to other actors in the region?

MOVING FORWARD:

13. Moving forward, where do you see CDB's strategic role in the education and training sector? What are the key priority areas in the sector that CDB should focus on?
14. What kind of changes would be required for CDB to perform that role?

Interview Protocol: BMC representatives consulted for the illustrative cases¹⁰⁵

GENERAL CHARACTERISTICS:

1. How long have you been in your position and what are your main responsibilities?
2. In what ways have you been engaged with CDB? What types of CDB projects are you implicated in?

RELEVANCE:

3. What do you consider to be the main needs and challenges in the area of [X]¹⁰⁶ in the Caribbean region/in your country?
4. To what extent has CDB's work in the education and training sector been aligned with the needs and priorities in this area? *[possible prompts: alignment of ETPS priorities with needs and priorities; relevance of size and types of ETPS financial and non-financial interventions to needs and priorities]*

EFFECTIVENESS AND SUSTAINABILITY:

5. What do you consider to be the main contributions of the Bank in the area of [X] at regional, sub-regional and/or BMC level?
6. What have the 2-3 most critical changes in capacity that have taken place in your country? (Prompt to understand if CDB indirect or direct support contributed in some way and to understand what other development partners provided support in this area.) To what extent have the capacity

¹⁰⁵ The illustrative cases are SEN, basic education, post-secondary/TVET. Representatives would cover the five BMCs relevant for the illustrative cases.

¹⁰⁶ SEN, basic education, post-secondary/TVET

changes been sustained (or likely to be sustained) in this area? *[possible prompts: Is there sufficient political, social, economic and technological support for capacity changes inside BMCs?]*

7. What are the areas where the Bank could do better? What would be required for the Bank to perform better certain areas?
8. Apart from its financial support, what has been the contribution of CDB's non-financial support in recent years (policy dialogue, partnership, and other initiatives)?

FACTORS AFFECTING ETPS PERFORMANCE:

9. What are the main factors that facilitate or hinder ETPS performance (e.g., global, regional, national, institutional contexts)? *[possible prompts: COVID-19, climate change, institutional capacity in BMCs]*
10. What are examples of measures taken by CDB and/or your country to respond to exogenous events and institutional capacity issues?
11. To what extent is CDB's work in area [X] aligned with other stakeholders' efforts (e.g., collaboration and coordination with regional entities, bilateral and multilateral development partners)?
12. What do you consider to be CDB's comparative strength in area [X] in relation to other actors in the region?

MOVING FORWARD:

13. Moving forward, where do you see CDB's strategic role in area [X] or the education and training sector more broadly? What are the key priority areas in the sector that CDB should focus on?
14. What kind of changes would be required for CDB to perform that role?

Interview Protocol: Regional stakeholders¹⁰⁷

GENERAL CHARACTERISTICS:

1. How long have you been in this position and what are your main responsibilities?
2. In what ways have you been engaged with CDB? What types of CDB projects are you implicated in?

RELEVANCE:

3. What do you consider to be the main education and training needs in the Caribbean region/in your country? *[possible prompts: 21st century challenges and imperatives, such as digitalisation, equity, gender equality, life-long learning, 21st century skills]*
4. To what extent has CDB's work in the education and training sector been aligned with your organization's priorities? *[possible prompts: alignment of ETPS priorities with needs and priorities in the region; relevance of size and types of ETPS financial and non-financial interventions to needs and priorities in the region]*

¹⁰⁷ Regional education entities, regional bodies (OECS Commission, CARICOM Secretariat) and development partners (IFIs, bilateral and multilateral development partners)

EFFECTIVENESS AND SUSTAINABILITY:

5. What do you consider to be the main contributions of the Bank to the sector at regional, sub-regional and/or BMC level? *[possible prompts: contribution to building capacity in the three ETPS objectives and cross-cutting areas, including gender equality, SEN, equity, digitalisation]*
6. To what extent are any perceived capacity changes likely to be sustained in BMCs and/or regional entities?
7. What are the areas where the Bank could do better? What would be required for the Bank to perform better certain areas?
8. Apart from its financial support, what has been the contribution of CDB's non-financial support in recent years (policy dialogue, partnership, and other initiatives)?

FACTORS AFFECTING ETPS PERFORMANCE:

9. What are the main factors that facilitate or hinder ETPS performance (e.g., global, regional, national, institutional contexts)? *[possible prompts: COVID-19, climate change, institutional capacity in BMCs]*
10. What are examples of measures taken by your organization, CDB and/or other entities in the region to respond to exogenous events and institutional capacity issues?
11. To what extent is CDB's work in education and training aligned with your organization's efforts (e.g., collaboration and coordination with regional entities, bilateral and multilateral development partners)? What kinds of partnerships has CDB engaged in within the context of the ETPS?
12. What do you consider to be CDB's comparative strength in relation to other actors in the region?

MOVING FORWARD:

13. Moving forward, where do you see CDB's strategic role in the education and training sector? What are the key priority areas in the sector that CDB should focus on?
14. What kind of changes would be required for CDB to perform that role?

APPENDIX 7 STAKEHOLDERS CONSULTED

Inception Interviews

During the inception phase, a total of 9 stakeholders from CDB were consulted, including 4 males and 5 females.

Table VI. i All Inception Interviews

NAME	ROLE AT CDB	M/F
Dr. Hyginus Leon	President	M
Christine Dawson	Deputy Director, Economics Department	F
Ronald James	Country Economist, focal point for education	M
Daniel Best	Head of Operations	M
Deidre Clarendon	Social Sector Division (SSD), Division Chief	F
Dr. Martin Baptiste	SSD, Senior Operations Officer (Education)	M
Paul Murphy	SSD, Operations Officer (Education) Poverty Reduction and Education Specialist	M
Neva Pemberton	SSD, Education Consultant	F
Ashaki Goodwin	Coordinator for CDB regional programming	F
Dionne O'Connor	Chief Results and Portfolio Analyst, Corporate Strategy Division (SDF)	F

Data Collection Interviews

During the data collection phase, a total of 58 stakeholders from all 19 BMCs were consulted, including 32 males and 26 females.

Table VI. ii Data Collection Interviews: BMCs

NAME	RESPONSIBILITY	M/F
ANGUILLA		
Bren Romney	Chief Education Officer, Department of Education	M
Dawn Reid	Education Planner, Department of Education	F
ANTIGUA AND BARBUDA		
Clare Browne	Director of Education, Ministry of Education, Sports and Creative Industries	M
Casroy Charles	President, Antigua and Barbuda Union of Teachers	M
Arlene Weste	Director, Antigua and Barbuda Institute of Continuing Education	F
Sarah Stuart-Joseph	Permanent Secretary, Ministry of Social Transformation	F
Almira Henry	Director of Social Policy, Ministry of Social Transformation	F
Kimberley Constant	Ministry of Social Transformation	F
BARBADOS		
Janice Gibbs	SEN Specialist, Ministry of Education, Technological and Vocational Training	F
Dr. Ramona Archer-Bradshaw	Chief Education Officer, Ministry of Education, Technological and Vocational Training	F
BELIZE		
Ricardo Gideon	Researcher/Planner of the Policy, Planning, Research and Evaluation Unit, Ministry of Education	M
BRITISH VIRGIN ISLANDS		
Dr. Connie George	Chief Education Officer, Ministry of Education, Culture, Youth Affairs, and Sports	F
CAYMAN ISLANDS		
Mark Ray	Director, Department of Education Services	M
Lyneth Monteith	Chief Education Officer (Acting), Department of Education Services	F
DOMINICA		
Dr. Jeffrey Blaize	Chief Education Officer (Acting), Ministry of Education and Human Resource Development	M

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GRENADA		
Angella Finlay	Chief Executive Officer, Ministry of Education	F
Agnes John-St.John	Special Education Needs Officer, Ministry of Education	F
Lynette Isaac	Literacy Coordinator, Ministry of Education	F
Kingsley Morgan	Chief Executive Officer, National Training Agency	M
Jude Bartholomew	President, Grenada Union of Teachers	M
Stephen Antoine	Project Coordinator for the T.A. Marryshow Community College Action Plan, Ministry of Education	M
GUYANA		
Nikki Cole	Project Coordinator, University of Guyana	F
Dr. Ritesh Tularam	Deputy Chief Education Officer (Technical), Ministry of Education	M
Marcel Hutson	Chief Education Officer, Ministry of Education	M
Shannielle Hoosien-Outar	Permanent Secretary, Ministry of Human Services and Social Security	F
Sanjay Pooran	Head of Training (Guyana Women's Leadership Institute), Ministry of Human Services and Social Security	M
Nicola M. Johnson	Chief Planning Officer, Ministry of Education	F
HAITI		
Yvon Junior Menelas	Coordonnateur de projet, ENAF/CB	M
Anouk Ewald	InnovEd-Université Quisqueya (UniQ)	F
Dr. Marc Prou	Senior Researcher, InnovEd-Université Quisqueya (UniQ)	M
JAMAICA		
Dr. Steven Kerr	Director, Policy Analysis and Research Unit/Education Sector Planner, Ministry of Education and Youth	M
MONTSERRAT		
Dr. Gregory Julius	Chief Education Officer, Ministry of Education, Youth Affairs and Sports	M
Hyacinth Bramble-Brown	Education Planner, Ministry of Education, Youth Affairs and Sports	F
SAINT KITTS AND NEVIS		
Francil Morris	Chief Education Officer, Department of Education Services	M
Christopher Herbert	Director of Education Management Information Systemics (EMIS)/Education Sector Planner, Ministry of Education	M
SAINT LUCIA		
Dr. Fiona Philip-Mayer	Chief Education Officer (former), Ministry of Education	F
Kendall Khodra	Deputy Permanent Secretary, Ministry of Education	M

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Claudia Louis	Chief Planning Officer, Ministry of Education	F
Shanell Leonce	Planning Officer, Ministry of Education	F
SAINT VINCENT AND THE GRENADINES (SVG)		
Endall Johnson	Director, National Qualifications Department (Secretariat of the Sector Skills Development Agency)	M
Ofwald Robinson	President, St. Vincent and the Grenadines Teachers' Union	M
Hugh Colin Sam	Principal, St. Vincent Grammar School	M
Dimitri Samuel	Project Manager, Ministry of Finance, Economic Planning and Information	M
Kay Martin-Jack	Chief Education Officer, Ministry of Education and National Reconciliation	F
Joseph Greene	Project Manager, Education Project Management Unit, Ministry of Education and National Reconciliation	M
Myccle Burke	Permanent Secretary, Ministry of Education and National Reconciliation	M
Merissa Finch-Burke	Director of Social Development, The Ministry of National Mobilisation, Social Development, Local Government, Gender Affairs, Family Affairs, Housing and Informal Settlement	F
Tony Regisford	Executive Director, Chamber of Commerce	M
Keith M.L. Thomas	Education Planner, Ministry of Education	M
Alexis Caine	Deputy Education Planner, Ministry of Education	M
SURINAME		
Peter Van Zich	Education Officer for Suriname, CARICHAM	M
THE BAHAMAS		
Dr. Marcellus Taylor	Chief Education Officer, Ministry of Education and Technical and Vocational Training	M
Sharmaine Sinclair	Assistant Director/Education Sector Planner, Ministry of Education	F
TRINIDAD AND TOBAGO		
Julia Ramirez-Modeste	Planning Officer, Ministry of Education	F
Lisa Henry-Davide	Educational Facilities Planner, Ministry of Education	F
Shawn Pouchet	Education Researcher, Ministry of Education	M
TURKS AND CAICOS		
Edgar Howell	Director of Education, Department of Education	M
Thalia D. Thomas	Policy and Planner Manager, Department of Education	F

During the data collection phase, a total of 12 stakeholders from CDB were consulted, including 8 males and 4 females.

Table VI. iii Data Collection Interviews: CDB

NAME	RESPONSIBILITY	M/F
Isaac Solomon	Vice-President Operations	M
Martin Baptiste	SSD, Senior Operations Officer (Education)	M
Paul Murphy	SSD, Operations Officer (Education) Poverty Reduction and Education Specialist	M
Elbert Ellis	SSD, Social Analyst	M
Ian Durant	Director of Economics Department	M
Tommy Descartes	Country Economist for Jamaica	M
Damien Reeves	Country Economist for Belize	M
Jason Cotton	Country Economist for Haiti	M
Donna Kaidou-Jeffery	Country Economist for Grenada	F
Farmala Jacobs	Gender and Development Specialist	F
Jessica Harris	Gender and Development Specialist	F
Melissa Felician	Policy Analyst and Program Evaluation Specialist	F
George Yearwood	Portfolio Manager, BNTF	M
Michel Thomas	Operations Officer, CTCS	M

During the data collection phase, a total of 9 stakeholders from development partners were consulted, including 6 males and 3 females

Table VI. iv Data Collection Interviews: Development Partners

NAME	RESPONSIBILITY	M/F
Sabine Rieble-Aubourg	Education Lead Specialist, Inter-American Development Bank	F
Hassan Ndahi	Senior Specialist, Skills and Employability, ILO	M
Stephen Boyce	Programme Manager and Communications Coordinator, European Union	M
Dorothee Roy	Alternate Director to CDB, Global Affairs Canada	F
Talia Miranda De Chaisemartin	Senior Education Specialist, Global Partnership for Education	F
Anton De Grauwe	Senior Programme Specialist (former), UNESCO	M
Bjorn Hassler	Director, Open Development and Education	M
Ian Mills	Deputy Development Director, UK Aid Caribbean and UK Alternate Director, Caribbean Development Bank, FCDO	M

Terry Brathwaite	Senior Programme Officer, FCDO	M
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During the data collection phase, a total of 20 stakeholders from regional entities were consulted, including 9 males and 11 females

Table VI. v Data Collection Interviews: Regional Entities

NAME	RESPONSIBILITY	M/F
Jayant Anil Padarath	Chairperson, CARICHAM	M
Petipha Lewis	Vice Chairperson, CARICHAM	F
Pierre van Zich	Vice-Chair for Grenada, CARICHAM	M
Dr. Laurette Bristol	Programme Manager for Human Resource Development, CARICOM Secretariat	F
Michele Small-Bartley	Deputy Programme Manager, Youth Development, Human and Social Development Directorate, CARICOM Secretariat	F
Renee Atwell	CARICOM Youth Ambassador	F
Dr. Garth Anderson	President, Caribbean Union of Teachers	M
Dr. Eduardo Ali	Pro-Registrar and Deputy Chief Executive Officer, Caribbean Examinations Council	M
Kevin Payne	Development Coordinator, Caribbean Examinations Council	M
Kristen Callahan	Chief Executive Officer, INMED Partnerships for Children	F
Sisera Simon	Head, Education Development Management Unit, OECS Commission	F
Nadette Langford	Technical Specialist EDMU, OECS Commission	F
Germaine Anthony	Technical Specialist EDMU, OECS Commission	M
Celeste Burton	Senior Technical Specialist EDMU, OECS Commission	F
Dr. Carlene Radix	Head of Human and Social Division, OECS Commission	F
Dr. Francis Severin	Pro-Vice Chancellor and Principal, UWI Open Campus (OC), University of West Indies	M
Dr. Halimah Deshong	Senior Lecturer and Head of the University of West Indies Institute of Gender and Development	F
Joel Samuel Warrican	Director, School of Education, University of West Indies	M
Henderson Eastmond	Caribbean Association of National Training Authorities	M
Kristen Callahan	INMED Partnerships for Children	F

APPENDIX 8 CDB BMC PRIORITIES

Priorities & Challenges	Anguilla	A&B	Bahamas	Barbados	Belize	BVI	Cayman Islands	Dominica	Grenada	Guyana	Jamaica	Montserrat	SKN	STL	SVG	T&T	TCI
Turfism, fragmentation between ministries		X															
Teacher training	X	X	X	X	X	X			X	X		X		X	X		X
New subjects (e.g., robotics, creative and performing arts, music, home economics)				X											X		
SEN and PWDs (e.g., inclusivity, diagnostic, access, quality, competency, infrastructure, specialists, assessments and labelling)	X	X		X		X	X		X	X		X		X	X		X
Other forms of inclusive education (e.g., access to education from rural and poor communities, social factors such as problems at home/hardships, scholarships, private vs. public schools, free school meals, free schooling)		X		X	X		X		X	X	X		X	X	X	X	
Digitalisation and ICT (e.g., teacher training, infrastructure, equipment, digital literacy/cybersecurity, Covid push)		X	X	X		X	X		X		X	X	X	X	X	X	
TVET (e.g., council/staffing, equipment, stigma)	X	X	X			X	X	X	X	X				X	X	X	X
Data/Monitoring and evaluation (e.g., collecting and analysing data,			X	X	X		X		X	X		X	X		X	X	X

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Priorities & Challenges	Anguilla	A&B	Bahamas	Barbados	Belize	BVI	Cayman Islands	Dominica	Grenada	Guyana	Jamaica	Montserrat	SKN	STL	SVG	T&T	TCI
developing policies and recommendations, setting standards)																	
Gender (e.g., male-dominated TVET, female dominated academic education-- closing the gaps)		X					X	X	X	X	X			X	X		
Supply of teachers (e.g., need to reduce student/teacher ratio, teacher retention, difficulty of profession)		X	X								X				X		X
Learning competencies of students (e.g., students not up to speed of their grade, learning gaps, lack of attendance, life skills, labor & traditional skills)		X	X	X				X	X	X	X	X	X	X	X	X	
School leadership (e.g., management, planning administration, innovation, motivation, voice for teachers)			X			X			X	X		X	X		X		
Infrastructure (e.g., rebuilding after natural disaster, include disaster considerations in building, specialized facilities, labs)	X					X	X	X	X	X		X			X		

APPENDIX 9 REGIONAL POLICIES AND FRAMEWORKS

YEAR	INITIATIVE
2012	CARICOM Youth Development Action Plan
2012	OECS Education Sector Strategy
2013	Regional TVET Strategy (Caribbean Association of National Training Agencies (CANTA) Standards of Practice for the Teaching Profession in the Caribbean Community developed. CARICOM Regional Task Force on Teaching and Teacher Education.
2013	Caribbean Regional Policy Framework for Open and Distance Learning
2014	UNESCO Education Strategy 2014–2021
2015	OECS Early Childhood Curriculum Framework is developed and adopted in 2015. OECS has since published a set of supporting documents with support from UNICEF, including a 2018 Training Manual and the 2022 Handbook for Teachers.
2015	Introduction of Agenda 2030 and SDGs
2016	GPE approves the OECS Education Support Program of US\$2 million. The regional program supports Dominica, Grenada, Saint Lucia and Saint Vincent and the Grenadines and is under the coordination of the OECS from July 2016 until September 2019.
2016	CDB, education planners and National Gender Bureaux prepare the Gender Implementation Guidelines (GIG) to integrate gender equality into education sector planning
2017	2030 CARICOM Human Resource Development Strategy (HRD 2030) is received and endorsed by the Council for Human and Social Development on March 2017. The HRD 2030 Strategy serves as a roadmap for the CARICOM Regional Education and Training Agenda. The implementation of the HRD 2030 in the first four years (2017-2020).
2018	GPE awards the region a sector plan development grant to support a mid-term review of the OECS regional sector strategy (2012-2020) and update the strategy and its implementation plan for the period 2019-2021. World Bank was nominated by the local education group to act as the grant agent.
2018	CDB and UNICEF publish the Caribbean Early Childhood Development Good Practice Guide .
2020	The Education Development Management Unit of the OECS Commission in collaboration with its Member States develops the OECS Education Sector Response and Recovery Strategy Coronavirus (COVID-19)
2020	GPE approves COVID-19 Accelerated Funding for four GPE Member States in the Caribbean: Dominica, Grenada, Saint Lucia and Saint Vincent and the Grenadines. The funding of US\$3 million covers the period 2020-2022. OECS Commission acts as the grant agent.
2021	OECS Response Strategy and Guidelines for the Continuity of Learning published in response to the COVID-19 pandemic.

APPENDIX 10 LIST OF PROJECTS

This appendix presents the portfolio list of CDB investment projects and TAs in the education and training sector over the period 2017-2022 based on the information obtained as of April 2022. The portfolio also includes select interventions in the area of TVET approved in 2016 that were explicitly mentioned by stakeholders. The portfolio does not reflect community-level education and training interventions managed by BNTF and CTCS. In addition, we note that the CDB/CARICOM/OECS Model Learning Recovery and Enhancement Programme for Caribbean Schools “Let’s Reap” is also not included in the portfolio of projects but has been referenced by stakeholders during the inception phase.

Project #	Country	Title	Amount (USD)	Disbursement (as of April 2022)	% Disb.	Board Approval Date	Type	Source	Beneficiaries	Gender Marker ¹⁰⁸	Education Subsector	Focus on SEN?
1	GRENADA	Grenada Education Enhancement Project - Phase II	7,589,888.50	1,445,775.39	19.05%	30-Dec-20	Loan	OCR	Grenada	GM	primary, secondary	Yes
	GRENADA	Grenada Education Enhancement Project - Phase II	9,000,000	501,278	5.57%	30-Dec-20	Loan	SFR, SDF	Grenada	GM	primary, secondary	Yes
	GRENADA	Grenada Education Enhancement Project - Phase II	200,000	-	-	30-Dec-20	Grant	SFR, SDF	Grenada	GM	primary, secondary	Yes
2	GRENADA	Technical Assistance – Assessment for the Enhancement of the T.A. Marryshow Community College (TAMCC)	500,000	202,750	40.55%	22-May-17	TA grant	SFR	Grenada, T.A. Marryshow Community College	GM	tertiary, TVET	
3	GUYANA	Hospitality and Tourism Training Institute Project	9,780,000	-	-	10-Dec-20	Loan + grant (USD116,000)	SFR, SDF	Guyana	GM	TVET, post-secondary	Yes

¹⁰⁸ Gender Marker scores: Gender specific (GS): 3.75-4 points; Gender mainstreamed (GM): 3-3.5 points; Marginally mainstreamed (MM): 1.5-2.75 points; NO: if projects score zero or 1

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Project #	Country	Title	Amount (USD)	Disbursement (as of April 2022)	% Disb.	Board Approval Date	Type	Source	Beneficiaries	Gender Marker ¹⁰⁸	Education Subsector	Focus on SEN?
4	GUYANA	Technical Assistance – Infrastructural Enhancement of the Library of the University of Guyana (UG)	149,985	50,005	33.34%	25-May-18	TA grant	SFR	University of Guyana	GM	post-secondary, tertiary	Yes
5	HAITI	Quality Enhancement in Public Education - Republic of Haiti	16,000,000	12,362,719	77.27%	14-Dec-17	Grant	SFR, SDF	Haiti, public primary schools, rural communities, parents, teachers	GM	primary, secondary	
6	REGIONAL	Technical Assistance - Facilitating Environmental Change Through Accessible Learning Resources	427,812	323,854	75.70%	19-Oct-17	TA grant	SFR	CXC, students and teachers from BMCs	GM	secondary, post-secondary, tertiary	
7	REGIONAL	Technical Assistance for a Regional Educational Leadership Conference and Workshop for The Organisation of Eastern Caribbean States Member States - Regional	49,455	46,458	93.94%	25-Apr-17	TA grant	SFR	Anguilla, Antigua and Barbuda, British Virgin Islands, Dominica, Grenada, Montserrat, St. Kitts and Nevis, St. Lucia and St. Vincent and the Grenadines.	GM	all	
8	REGIONAL	Regional Technical Workshop on Education Planning, Monitoring and Evaluation of The Sustainable Development Goals 4 Goals and Targets for	149,500	104,859	70.14%	18-May-17	Grant	SFR, SDF	CDB BMCs (senior technical officers in the Ministries of Education)	GM	all	

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Project #	Country	Title	Amount (USD)	Disbursement (as of April 2022)	% Disb.	Board Approval Date	Type	Source	Beneficiaries	Gender Marker ¹⁰⁸	Education Subsector	Focus on SEN?
		Education in Borrowing Member Countries										
9	REGIONAL	Technical Assistance for Preparation of a Conceptual Study/Proposal for the New Science and Technology Facility at the University of the West Indies, Cave Hill Campus	149,950	147,401	98.30%	02-Dec-17	Grant	SFR	UWI, CDB BMCs, in particular Barbados and OECS countries	GM	tertiary	
10	REGIONAL	Enhancement of the University of the West Indies TV	130,000	127,270	97.90%	28-Nov-17	Grant	SFR	UWI, CDB BMCs	GM	tertiary	
11	REGIONAL	Regional Conference on Early Childhood Development in the Caribbean	148,500	139,872	94.19%	02-Dec-17		Use of Funds	CDB	GM	ECD	
12	REGIONAL	Preparation of a Comprehensive Sport for Development Initiative for the New Faculty of Sport of The University of the West Indies	210,000	207,669	98.89%	28-May-18	TA grant	SFR	UWI	GM	tertiary, TVET	
13	REGIONAL	International Teachers' Task Force for Education 11th Policy Dialogue Forum on Teachers and Teaching	49,800	49,586	99.57%	29-Oct-18	TA grant	SFR	CDB BMCs	GM	primary, secondary, tertiary, TVET	

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Project #	Country	Title	Amount (USD)	Disbursement (as of April 2022)	% Disb.	Board Approval Date	Type	Source	Beneficiaries	Gender Marker ¹⁰⁸	Education Subsector	Focus on SEN?
14	REGIONAL	Development of a Model Special Educational Needs Policy and Strategy	213,000	13,419	6.30%	24-Feb-20	Grant	SFR	CDB BMCs	GM	all	Yes
15	REGIONAL	Addressing Inequities in Online Teaching and Learning at the University of the West Indies	200,000	72,440	36.22%	18-Sep-20	Grant	SFR	UWI	GS	tertiary	
16	REGIONAL	Supporting Assessment and Intervention Programmes for Special Education Needs (Sen) Learners in Barbados and the Organisation of Eastern Caribbean States (OECS)	200,000	80,060	40.03%	25-Nov-20	Grant	SFR	UWI, Barbados, OECS countries	GM	Primary, secondary	Yes
17	REGIONAL	Technical Assistance - Capacity Building in Educational Planning and Preparation of a Strategic Plan for the Caribbean Centre for Educational Planning, UWI	94,000	65,880	70.09%	23-Sep-21		SFR	UNESCO, CDB BMCs (education statisticians and education planners), core staff of the Caribbean Centre for Educational Planning	GM	all	
18	SVG	School Improvement Project - Phase 1	15,000	-	-	20-Dec-20	Grant	SFR, SDF	St. Vincent and the Grenadines	GM	primary, secondary	
	SVG	School Improvement Project - Phase 1	6,549,389.50	650,354.38	9.93%	10-Dec-20	Loan	OCR	St. Vincent and the Grenadines	GM	primary, secondary	
	SVG	School Improvement Project - Phase 1	7,000,000	211,400	3.02%	10-Dec-20	Loan	SFR, SDF	St. Vincent and the Grenadines	GM	primary, secondary	

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Project #	Country	Title	Amount (USD)	Disbursement (as of April 2022)	% Disb.	Board Approval Date	Type	Source	Beneficiaries	Gender Marker ¹⁰⁸	Education Subsector	Focus on SEN?
19	Antigua & Barbuda	Enhancing Learning Continuity and Resiliency Project	1,000,000	-	-	31-Mar-22	Loan	SFR, IDB Covid-19 OECS Line of Credit	Antigua & Barbuda	GM	primary, secondary	Yes
20	St. Kitts & Nevis	Enhancing Learning Continuity Project	4,155,000	-	-	31-Mar-22	Loan	SFR, IDB Covid-19 OECS Line of Credit	St. Kitts & Nevis	GM	primary, secondary	Yes
21	SVG	Technical Assistance - National Standardisation and Certification of Exportable Services Providers	128,590 (EUR)	-	-	31-Mar-22	Grant	SFR, EPA and CSME Standby Facility	GOSVG, citizens, private sector	GM	TVET	
22	Antigua & Barbuda	Enhanced Technical Vocational Education Training Framework for Certification	302,535	-	-	31-Mar-22	Grant	SFR, EPA and CSME Standby Facility	GOAB, citizens of Antigua and Barbuda, private sector businesses.	GM	TVET	Yes
23	REGIONAL	Technical Assistance - Preparation of the Gender-Responsive Caribbean New School Model Conceptual Framework, Roadmap for Implementation, and Architectural Design Considerations for Early Childhood and Basic Education School Facilities	41,000	16,050	39%	31-Mar-22		SFR	CDB, CDB BMCs	GM	ECD, primary, secondary	Yes
24	REGIONAL	University of the West Indies Digital	4,000,000	-	-	expected (Dec 9, 2022)	Loan	OCR	UWI	GM	tertiary	Yes

REVIEW OF CDB'S EDUCATION AND TRAINING POLICY AND STRATEGY

Project #	Country	Title	Amount (USD)	Disbursement (as of April 2022)	% Disb.	Board Approval Date	Type	Source	Beneficiaries	Gender Marker ¹⁰⁸	Education Subsector	Focus on SEN?
		Transformation Project										
	REGIONAL	University of the West Indies Digital Transformation Project	2,000,000	-	-	expected (Dec 9, 2022)	Loan	SFR, SDF	UWI	GM	tertiary	
	REGIONAL	University of the West Indies Digital Transformation Project	190,000	-	-	expected (Dec 9, 2022)	Grant	SFR, SDF	UWI	GM	tertiary	
25	SVG	TVET Development Project	7,317,000	Not available		01-Mar-16	Loan (additional)	SFR	MoE	GM	TVET	
	SVG	TVET Development Project	330,000	Not available		01-Mar-16	Grant	SFR	MoE	GM	TVET	
26	Guyana	Skills Development and Employability	11,700,000	Not available		08-Dec-16	Loan	SFR	MoE	GM	TVET	Yes
	Guyana	Skills Development and Employability	552,000	Not available		08-Dec-16	Grant	SFR, ACP-EU-CDB, ACP-EU NDRM Resources	MoE	GM	TVET	Yes