

**JAPAN POVERTY REDUCTION PROGRAM (JPO)
COMMUNITY BASED PROGRAM (CBP)
IMPROVING BILINGUAL EDUCATIONAL SERVICES TO THE INDIGENOUS POPULATION IN
CHIAPAS
(ME-T1041)**

PLAN OF OPERATIONS

I. BASIC PROJECT DATA

Beneficiary country:	México
Project team:	Consuelo Ricart (SPH/CME), Team Leader; Emma Näslund-Hadley (SCL/EDU); Claudia Uribe (SCL/EDU); Maria Cristina Landazuri-Levey (LEG/SGO); Martha Guerra (SCL/SPH); and Claudia Cox (SCL/EDU).
Beneficiaries:	Direct. Marginalized Indigenous School Communities in the Highlands of Chiapas. Indirect. Marginalized Indigenous school system throughout Chiapas and México
Executing agency:	<i>Innovación y Apoyo Educativo A.C.</i>
Financing plan:	IDB Japan Poverty Reduction Program (JPO): US\$149,600 Local counterpart (in kind): US\$122,000 Total: US\$271,600
Execution period:	24 months
Disbursement period:	30 months

II. BACKGROUND AND PROBLEM STATEMENT

- 2.1 **Education standards in the indigenous population.** The National Institute for Educational Evaluation (INEE), summarizing the state of education in México,¹ identified the learning gap in indigenous schools as the biggest challenge facing public education in México. Entrenched inequality of opportunity in schools continues to deny economic and social mobility to México's indigenous population. The average years of schooling amongst the indigenous population over 15 years of age is 4.5 (5.1 in men, and 3.9 in women), this compares with a national average of 8.1.² Within the formal school system the academic achievement of indigenous students is consistently and considerably lower than the national average.³

¹ INEE (2004). Panorama educativo de México Indicadores del sistema educativo nacional 2004, 611 pp.

² INEGI (2005). II Conteo de Población y vivienda 2005, consultado el 8 de marzo del 2007 en: <http://www.inegi.gob.mx/inegi/default.aspx>.

³ INEE (2006). Panorama educativo de México. Indicadores del sistema educativo nacional 2006, 605 pp. For example, the percentage of 6th grade indigenous students with a high academic achievement in reading is 3.8% (0.4% in Chiapas), compared with an urban school average of

- 2.2 **The indigenous school system.** Poverty, cultural differences, and social and geographic marginalization are all factors that condition educational achievement. In response to this the Secretary of Education (SEP) established the indigenous school system to deliver bilingual and culturally contextualized education services to indigenous communities in México. However, this program has faced many challenges within a large sector which nationally at primary level is made up of 9,726 schools, 34,990 teachers, and 830,792 students, and at pre-school 9,146 schools, 15,566 teachers, and 360,140 students.⁴ Across México the proportion of the general population monolingual in an indigenous language is significant (12.3%). In Chiapas this percentage is 25.2%, the highest in the country, and rising.⁵ One of the key issues affecting the quality of bilingual education is the professional training of the teachers themselves.⁶ There have been attempts to improve access to education in poor, isolated and mostly indigenous communities, such as the CONAFE⁷ Community Education Program (PIEC)⁸ supported by IDB but problems with targeting and with the use of non-qualified volunteer teachers to expand services have proven difficult to surmount. Reform efforts have traditionally been centralized and do not encourage indigenous education professionals to generate leadership and innovation at the local level.
- 2.3 **The priorities.** The project will address the need to improve the education standards in indigenous schools, and will focus on the key issue of bilingualism as the essential medium for learning and teaching. The underlying hypothesis is that the learning of a second language (in this case Spanish) is facilitated when students are already literate in their mother tongue.⁹ It is important to highlight that a quality bilingual education has many advantages compared to its Spanish counterpart.¹⁰ However, some studies on the subject have revealed that there is still a huge divide between theory and practice in the field, and that where good practice is found to exist, it is usually the result of initiatives from the civil society sector and not the consequence of government policy. It is therefore of great

23.6%. The rate of school desertion amongst indigenous primary students is 3.5 compared with the 1.9 in general primary schools. In Chiapas this figure rises to 4.8 in indigenous schools and 3.3 in general primary schools.

⁴ INEE (2006). Panorama Educativo de México. Indicadores del Sistema Educativo Nacional 2006, pp. 27.

⁵ 25.2% refers to the overall population in Mexico. INEGI (2005). II Conteo de Población y Vivienda 2005, consultado el 8 de marzo de 2007 en: <http://www.inegi.gob.mx/inegi/default.aspx> In Chiapas the percentage of the school population who are monolingual in an indigenous language is 27.3% and for those between 6–11 years of age this figure is 31.4%. For Chiapas the total number of monolingual indigenous students within the system is calculated at 85,713. According to all indicators these students are at a considerable disadvantage within a system that fails to offer a service that is not adequately contextualized.

⁶ Serrano Ruiz, Javier (1998). “El papel del maestro en la educación intercultural bilingüe”, en Revista Iberoamericana de Educación, N° 17, pp. 91-102.

⁷ CONAFE: El Consejo Nacional de Fomento Educativo.

⁸ PIEC: Programa Integral de Educación Comunitaria.

⁹ Cummins, J (2000). Language, Power and pedagogy: Bilingual Children in the Crossfire. Multilingual Matters Ltd.

¹⁰ Abram, Matthias L (2004). Estado del arte de la educación bilingüe intercultural en América Latina, Washington D.C, pp. 59; Schmelkes, Silvia. “La educación intercultural: un campo en proceso de consolidación”, en Revista Mexicana de Investigación Educativa, N°20, pp. 9-13.

importance that a bridge be built between civil society innovation and the official sector.¹¹

- 2.4 Recent institutional agreements and decentralization policies put forward by the Government, (National Agreement for the modernization of the Basic Education, 2002;¹² PEC, 2006;¹³ National Program of Education, 2001-2006)¹⁴ set up a framework aimed at improving the quality of education processes. Given the particular difficulties of delivering quality education services to indigenous populations, this proposed project will provide an opportunity to pilot methodologies that would contribute to these education objectives.¹⁵ Technical assistance will be provided through a process to empower local teachers and staff of the school supervision, and will prioritize the development of analytical, communicative, organizational, documentary and pedagogical skills, and teacher literacy in the mother tongue.
- 2.5 **Program rationale, consistency with Bank strategies and value added.** The Technical Cooperation (TC) project falls under the Bank's country strategy with México which recognizes that amongst the challenges in addressing poverty in México limitations persist with regard to the quality of services that the poor receive, particularly in the south and southeast (e.g. Chiapas), and with regard to education, particularly related to academic performance, grade repetition, and drop-out rates.¹⁶ The TC falls within the remit of the Bank's new Policy on Indigenous Peoples and will support its objective to provide culturally pertinent social services. The TC also responds to the JPO/CBP Fund to support poverty reduction through well-targeted activities that respond directly to the needs of socially and/or economically disadvantaged people, in this case the indigenous peoples of Chiapas; and to the JPO/CBP directive to support capacity building for those working with such communities, in this case local indigenous teachers. The TC will also facilitate stakeholder participation through participatory methodologies in working with teachers at the community level.

¹¹ García Segura, Sonia (2004). "De la educación indígena a la educación bilingüe intercultural, la comunidad purépecha, Michoacán, México", en Revista Mexicana de Investigación Educativa, N° 20, pp. 61-81; Saldívar Moreno, Antonio, et al. (2004). "Los retos de la formación de maestros en educación intercultural, la experiencia de la Casa de la Ciencia, Chiapas", en Revista Mexicana de Investigación Educativa, N° 20, pp. 109-128.

¹² Zorrilla, M. (2002). Diez años después del Acuerdo Nacional para la Modernización de la Educación Básica en México: Retos, tensiones y perspectivas. Revista Electrónica de Investigación Educativa, 4 (2). <http://redie.uabc.mx/vol4no2/contenido-zorrilla.html>.

¹³ PEC, Diario Oficial de la Federación, 23 de febrero de 2006.

¹⁴ National Program of Education 2001-2006.

¹⁵ In this context, the project will focus on the development of pedagogical leadership within schools and the promotion of peer learning between teachers and schools belonging to one selected school supervision. The supervision will be chosen using the following criteria: number of schools within its jurisdiction; location of the supervision and schools; the language distribution within schools; the size of the technical staff of the supervision.

¹⁶ México Country Strategy Paper, 2002, pp. 1. Poverty Reduction and Promotion of Social Equity, BID Strategy Document, August 2003 pp. 30-31.

III. PROGRAM OBJECTIVE AND DESCRIPTION

- 3.1 Project goal and purpose. The long-term goal of this project is to create a model for bottom-up reform, and a methodology for accompanying teachers, schools, and school supervisors in the search for locally generated solutions to entrenched education problems. Whilst long-term outcomes are to be measured in improved education results in indigenous education, short to medium term outcomes focus on improved professional development, the consolidation of an effective peer learning community with an active grass-roots leadership, and the implementation of classroom innovation across the school.
- 3.2 Specifically, this project seeks to establish a pilot project to build capacity in indigenous schools in Highland Chiapas to deliver an improved bilingual education system through a bottom-up reform process, focusing specifically on the critical question of language and literacy in indigenous schools. One of the key challenges of the project is that although officially indigenous education is bilingual, the indigenous language is often excluded in the classroom and students struggle to learn curriculum content in Spanish, without first having become fully literate in their mother tongue. This creates an initial learning gap from which indigenous students never recover. Many academic studies have convincingly demonstrated that literacy and competency in the mother tongue facilitates the learning of a second language, in this case Spanish. Therefore the project's principal objective is therefore to improve school achievement through the effective implementation of bilingualism in the school, and to generate a model for change of national and international relevance.
- 3.3 The specific objectives are: (i) to provide technical assistance to strengthen and empower local teachers and staff of the school supervision to develop and enhance their analytical, communication, organizational, documentary and pedagogical skills and literacy in their mother tongue; and (ii) to engage in a process of consciousness raising with indigenous teachers on issues of language and culture.
- 3.4 The project aims to build on the experience initiated in 2006, which began with technical assistance to support indigenous bilingual education methodology and use. Since then *Innovación y Apoyo Educativo, A.C.*, through its *Casa de la Ciencia* initiative has been building close relationships with the schools in the area¹⁷. None of the institutions working with this technical TC will profit from the Japan Poverty Reduction Program (JPO) contribution. As part of the formal agreement with education authorities, school supervision will present advances every year to the Direction of Indigenous Education. The project will also report every year to the State Direction for Indigenous Education, who will be represented in the project through the collaboration of the school supervision. The project will have two components:

¹⁷ Casa Ciencia is the name of an initiative managed by *Innovación y Apoyo Educativo, A.C.*, not an organization. By building on this initial experience of collaboration, the project will not only ensure the creation of new educational opportunities for its direct beneficiaries, but also further contribute to the dialogue occurring around indigenous education policy at a state and national level.

- 3.5 **Component I. Capacity Building to Strengthen Schools to Deliver an Improved Bilingual Education System: #1 Creation of the interdisciplinary team.** Project Staff will liaise with the Direction for Indigenous Education in Chiapas to define the precise terms for the distribution of responsibilities within the project. Personnel from the chosen school supervision will be consulted and working agreements will be established to enable the project to be executed jointly, under the technical supervision of *Innovación y Apoyo Educativo, A.C.* Depending on the size of the supervision selected and the level of school uptake between 15 and 25 schools will participate in the project, in addition to the school supervision. **#2 Diagnosis.** The project will engage local indigenous teachers in an initial analysis of the problems facing indigenous education, based principally on evidence from their own direct experience. The diagnostic process will include observation in classroom, interviews, and participatory workshops. As well as providing the framework for subsequent actions, the diagnostic process is also seen as an awareness raising activity, and the first step in the training process. **#3 Design and implementation of bilingual training processes.** The technical team will coordinate with teachers and the school supervision to support the design of a multi-faceted training program that will include: observation and feedback, professional exchanges, workshops, diplomas. **#4 Design and implementation of whole-school project.** The participating schools will design and implement a series of bilingual projects based on knowledge acquired during the training process, and on professional experience in their context. The diagnostic and training components are necessary antecedents for this phase. The program team and the school supervision will give ongoing technical feedback to schools over a period of one school year, within the two-year framework of the whole program. **#5 Production of bilingual materials.** Educational materials will be developed as necessary to promote the availability of context specific education materials, and as a means of encouraging teachers to take a lead role in material production.
- 3.6 The following component will evaluate and validate the instruments developed in the program and ultimately the impact on student learning (which the school system will implement after four years of operation of the program because 20 months is too short a timeframe achieved significant improvement in the first group). This type of evaluation is ongoing and should not be confused with the final evaluation of this TC (see paragraph 3.8).
- 3.7 **Component II: Analysis and Learning: #1 Program monitoring, documentation and dissemination.** All stages of the process will be documented with the aim of creating a clearly defined model of intervention and innovation. This will include review at different stages of the processes in order to ensure that learning from one stage is taken into consideration at subsequent stages of the process. Participants and beneficiaries will be encouraged to represent the project in different academic spaces (congresses and forums), and the academic articles on the findings of the project will be published.¹⁸ The process will be quantitative and qualitative using a variety of instruments produced by a technical team

¹⁸ The Direction for Indigenous Education in Chiapas will be key interlocutors to prepare for the scaling up of the project if successful.

(questionnaires, classroom observation forms, interviews with focus, group workshops) and academic test results available from national and state sources (ENLACE, INEE, and INEVAL). Academic performance results and drop out rates on finalizing the 24 months will be compared for the year previous to beginning the project. The goals of the systematization and academic evaluation will be: (i) to provide ongoing feedback to teachers, supervisory and project staff regarding the projects advances, successes and limitations; (ii) to identify clearly which types of intervention are most effective in catalyzing changes in teaching practice, and the nature of this change in practice; (iii) to identify teaching practices which produce the best results in students; (iv) to identify obstacles that any reform attempt may encounter; and (v) to provide evidence and recommendations to policy makers and indigenous school supervisors of best practice. Academic evaluation measures will be both qualitative (interviews, focus groups, observation) and quantitative (student standard test results). A baseline measure of the schools will be taken through the initial qualitative and quantitative diagnosis and all subsequent evaluation will be based both on the changes seen from the baseline position and by making quantitative comparisons with state and national averages.

- 3.8 This project will help lay the ground work for the local public education system to gather the baseline data needed for the education authorities to implement the first impact evaluation of this program after four years of operating the program. For future impact evaluations, the public school system will rely on the data produced by INEE and ENLACE. To monitor the progress of schools the following indicators will be collected: (i) ability to design and implement participative and dynamic processes with teachers; (ii) awareness of the specific characteristics of schools within their jurisdiction; (iii) mother tongue literacy; (iv) value given to teaching the mother tongue; (v) use of classroom observation as a tool for monitoring and feedback; (vi) distribution of academic and administrative time; and (vii) capacity and willingness to represent and talk about the project. Within the participating schools and teachers the following indicators will be monitored: (i) existence of an explicit and specific school-wide policy for bilingualism; (ii) teacher use of mother tongue in the classroom (when/how); (iii) value given to teaching the mother tongue; (iv) integration of culturally specific content through greater use of the mother tongue; (v) mother tongue literacy; (vi) time spent planning and discussing bilingual issues in the collective; (vii) evidence peer learning and the communication and adoption of good practice; and (viii) evidence of bilingual education in the physical school environment. Within the student population of the participating schools the following indicators will be monitored: (i) literacy levels in the mother tongue; (ii) homework and class work in the mother tongue; (iii) test scores in Spanish and Math; (iv) drop-out rates; and (v) expressed satisfaction with the school experience. Within the parent population of the participating schools the following indicators will be monitored: (i) knowledge of the project and its objectives; (ii) acceptance of the project and its objectives; and (iii) participation in the academic life of the school. Within the Direction of Indigenous Education the following indicators will be monitored: (i) knowledge of the project objectives and advances; (ii) level of material and moral support;

(iii) capacity and willingness to talk about and represent the project; and (iv) actions taken to communicate the experience to other school supervisors. Final results of impact the first impact evaluations will consider upon a before and after comparison of ENLACE (*Examen Nacional de Logro Académico de los Centros Escolares*) test results in mathematics and Spanish for each participating school, as well as comparisons with the national academic averages for indigenous and general education. Impact in drop out rates provided by INEE will also be taken as a measure of project success.

- 3.9 **Resource targeting.** The project is grass roots oriented and the majority of resources will be dedicated to attend the needs of direct beneficiaries (indigenous teachers and students). A small percentage of resources will also be dedicated to the documentation and dissemination of the project with the objective of assuring that its findings can contribute to the national debate on indigenous education.

IV. EXPECTED OUTPUTS/PRODUCTS

- 4.1 The expected results are: (i) train up to 100 teachers in approximately 20 schools, and up to five members of the school supervision. As a result of training and technical assistance approximately 20 school projects designed to improve bilingual education across the school will be implemented and evaluated. These projects will benefit up to 3,000 indigenous students in 20 communities in the Highlands of Chiapas. As a result indigenous education professionals will be better equipped to provide a quality bilingual education to students. As a result educational achievement in national tests for ENLACE and INEE are expected to improve significantly over the two year period; (ii) a final report to the Bank will document this pilot experience, and academic articles will contribute to the indigenous education policy arena; (iii) education materials for use in indigenous schools will be produced and socialized, some based on the productions of the teachers involved in the project; and (iv) if the pilot is successful the project will be presented for mainstreaming in all 10-school supervisions of the school zone 710 of the highlands, as well as being presented for possible up scaling through the National Direction for Indigenous Education and the Coordination for Intercultural and Bilingual Education.

Table IV-1 Budget*

Type of Expense	JPO	Local	TOTAL
COMPONENT I. Capacity Building to Strengthen Schools to Delivery an Improved Bilingual Education System	96,000	114,000	210,000
COMPONENT II. Evaluation and Learning	16,400		16,400
Administrative cost	30,000	8,000	38,000
Contingencies	7,200		7,200
TOTAL	149,600	122,000	271,600

*see Detailed Budget on Annex II

- 4.2 The JPO contribution will finance mainly the honorarium, travel and per diem expenses for the Indigenous teachers' collaboration in the project, the equipment as well as the final audit and evaluation. The local counterpart will be dedicated to the indigenous teachers' collaboration to the project. Both, JPO and local counterpart resources will be dedicated to general support.

V. EXECUTING AGENCY AND EXECUTION STRUCTURE

- 5.1 The project will be executed by *Innovación y Apoyo Educativo A.C.* innovation, originally was founded in 1994. It is dedicated to the promotion of education reform in México. It promotes and administres three initiatives: *Casa de la Ciencia*, *Centro de Educación e Integración Humana*, and *Fondo de Apoyo a la Educación Intercultural Bilingüe*. This project would be operated from *Casa de la Ciencia* initiative, which operates three educational innovation projects in Teaching, Educational Leadership, and Community and Schools. The Initiative furthers *Innovación y Apoyo Educativo, A.C.*, mission of improving education quality in México, and favors a growing focus on indigenous and intercultural education. *Innovación y Apoyo Educativo A.C.* will liaise with the Direction for Indigenous Education in Chiapas to develop this project on the basis that if successful, it may be scaled up in other areas.
- 5.2 *Innovación y Apoyo Educativo A.C.* is ideally positioned to execute the TC because it has a proven track record and expertise in: bilingual education, experience working with the indigenous school system in Chiapas, and project experience in this politically sensitive area of indigenous policy in Mexico. *Innovación y Apoyo Educativo, A.C.*, is also internationally recognized. In addition to receiving grants and recognition from two internationally known foundations (Ford and Kellogg) the organization was recently selected as one of three projects representing México in an international study of good practice in 18 Latin American countries (Instituto Latinoamericano de Comunicación Educativa). *Innovación* also collaborates with local, state and federal governments. This agency participated actively in the modifications requested by newly formed departments of the Bank and has repeatedly manifested continued interest to initiate the activities of this project which continue to be timely and relevant to the region.
- 5.3 Limited services will be contracted to provide project coordination and supervision. These will follow the provisions of the Bank Policy on Technical Cooperation (GN-2470-2).
- 5.4 **Major Issues.** Demand for the improvement of indigenous education is part of both the public and political agenda of México. The question of indigenous education has been officially recognized by the National Institute for Educational Evaluation as a priority area for improvement, without which México cannot aspire to achieving educational parity with countries in the North. Likewise, education is firmly established within indigenous communities as a vehicle for social and economic betterment.
- 5.5 **Value added.** The project will occur within the context of a clearly defined structure for the provision of educational services to the indigenous population, and as such will seek to add value to these same existing structures.
- 5.6 **Sustainability.** Direct beneficiaries of the projects' training processes are government employees with permanent contracts, as well as the children they teach. Improved professional capacity is therefore expected to have ongoing

benefits over their careers as education professionals. The executing agency will execute the project through its *Casa de la Ciencia* initiative, it will be conducted in close collaboration with the staff of the school supervision with the aim of creating a multiplier effect: the supervision will subsequently be well placed to continue developing their leadership in this field, and to share strategies for stimulating innovation with other supervisions within the indigenous education system. At a national level, also, there is great interest in any local experiences that prove successful in creating greater dynamism within schools and supervisions, especially in underperforming areas. Well documented transformation of teaching and organizational practice in the indigenous schools is certain to be taken up by the Secretary of Education at a national and state level. This will in turn provide on going sustainability of the evolution of the experience.

- 5.7 **Capacity to execute.** *Innovación y Apoyo Educativo* A.C. is well-established. Through the *Casa de la Ciencia* initiative, founded previously in 1994, it has acquired considerable knowledge of the education sector in Chiapas and benefits from a well developed network of contacts at all levels within the state, considerable expertise in the field of professional development and project management for education reform. Work is already underway with one indigenous school and it is this experience that provides the reference point for this TC Project, which seeks to consolidate a model of education reform in the indigenous sector.
- 5.8 **Monitoring and evaluation.** After 20 months of execution or 80% of the funds of this TC are disbursed, the executing agency will contract independent consultants to do the final evaluation and evaluate the key project outcomes. The independent evaluator will analyze outcome data and a review of academic progress. Monitoring indicators outlined in the logical framework (See Annex I) will be maintained directly by executing agency and made available to independent evaluators, the Bank and participating organizations as needed. The project staff will gather information through participatory processes to help build local capacity in this area. *Innovación y Apoyo Educativo* has experience in the systematization of monitoring information. The progress of approximately 20 schools in the Highlands of Chiapas which are direct beneficiaries of the program will be monitored. The results of this pilot experience should contribute to furthering know-how on working with the indigenous population of México.
- 5.9 **Ownership.** Whilst *Innovación y Apoyo Educativo* will provide the necessary technical assistance and leadership, the project is supported by a broader school supervision program of the State Direction of Indigenous Education. This Direction is positioned as an active stakeholder in the process through a formal agreement, signed in May 8, 2008 outlining project objectives and responsibilities of the three principal actors (*Innovations' Casa de la Ciencia* initiative, the supervision, and the Direction of Indigenous Education). Within this agreement efforts will be made to place as much of the leadership as possible within the official sector; for example, the school supervision will be expected to represent the project at a state and national level to ensure the sustainability of the program and to achieve the desired multiplier effect.

VI. ACTION PLAN

- 6.1 The project begins with a participatory diagnosis of the problems and opportunities facing schools and teachers in the chosen school zone (comprised of between 18-25 schools). This analysis serves as a basis for the detailed design of a training program for teachers, which eventually results in the creation and implementation of whole school innovation projects. The diagnosis involves the school supervisor, school principals, teachers, students and parents. In addition to providing the baseline for all subsequent activity, the diagnosis is also seen as a first step in capacity building, and the means of generating awareness of the problem, as well as an initial commitment of the school communities to the project and its goals. Training will contemplate socio-linguistics of indigenous languages, best practice in the teaching of indigenous languages, literacy in indigenous languages, teaching Spanish as a second language, the development of integrated linguistic projects, and educational leadership for technical teams. School projects, as defined by participating schools under the guidance of the technical team, will be implemented over one school year and technical assistance and accompaniment provided to the schools during this period, within the two year framework for the overall program. Self-regulation and for disseminating results in official and academic forums will be monitored. Teaching practice, analysis of whole school project design and implementation, comparative analysis of student performance, interviews with participants, and conclusions of the team working directly on the project will be documented.

Table VI-1 Action Plan

Months Activity	1 and 2	3 and 4	5 and 6	7 and 8	9 and 10	11 and 12	13 and 14	15 and 16	17 and 18	19 and 20	21 and 22	23 and 24
Inter-institutional team building	X											
Participatory diagnosis	X	X										
Professional development		X	X	X	X							
Whole school bilingual projects					X	X	X	X	X	X		
Monitoring & documentation	X		X		X		X			X		X
Independent evaluation of impact										X		
Production of educational materials							X	X	X			
Dissemination of results					X	X					X	X

VII. ENVIRONMENTAL AND SOCIAL STRATEGY

- 7.1 According to the Bank’s Environment and Safeguard Compliance Policy, this operation was classified as category “C.” This TC will support the development of bilingual education services and is therefore not expected to have any negative environmental or social impact. As this TC is limited to consultancy services it is not expected to have any negative environmental and social impacts.

VIII. RESPONSIBILITY IN THE BANK

- 8.1 **Technical responsibility.** Claudia Uribe (SCL/EDU) in coordination with Consuelo Ricart (SCL/SPH) will be responsible for managing the execution of the

proposed project. CID/CME Tel: (5255) 9138-6200, e-mail: consuelor@iadb.org, fax: (5255) 9138-6229; SCL/EDU Tel: (202) 623-3306 e-mail: claudiau@iadb.org.

- 8.2 This operation will be executed in 24 months and disbursed in 30 months. The Country Office in Mexico will be responsible for the disbursement of this TC.

IX. RECOMMENDATION

- 9.1 Consuelo Ricart, designated team leader for the project of the reference, recommends the approval of this operation and the use of resources from the **Japan Poverty Reduction Program (JPO)** totaling up to US\$149,600 in order to finance the corresponding project.

X. CERTIFICATION OF FUNDS

- 10.1 I hereby certify that this operation was approved for financing under the Japan Poverty Reduction Program (JPO) through a memorandum dated June 8, 2007 and signed by Naoyuki Shinohara, Director-General of the International Bureau, Ministry of Finance, Japan. In addition, I certify that resources from the Japan Poverty Reduction Program (JPO) are available for up to US\$149,600 in order to finance the activities described and budgeted in this document. This certification reserves resource for the referenced project for a period of one (1) month counted from the date of signature below. Were the project not approved by the IDB within that period, the reserve of resources will be cancelled; except if a new certification is obtained. The commitment and disbursement of these resources shall be made only by the Bank in US dollars. The same currency shall be used to stipulate the remuneration defined and payments to consultants except that local consultants working in their own borrowing member country shall have their remuneration defined and paid in the currency of that country. No resources of the Fund shall be made available to cover amounts greater than the amount certified herein above for the implementation of this Plan of Operations. Amounts greater than the certified amount may arise from commitments on contracts denominated in a currency other than the Fund currency, resulting in currency exchange rate differences, for which the Fund is no at risk.

(ORIGINAL SIGNED)

09/18/08

Marguerite S. Berger, Chief
VPC/GCM

Date

XI. APPROVAL

(ORIGINAL SIGNED)

09/18/08

Marcelo Cabrol, Chief
SCL/EDU

Date

**IMPROVING BILINGUAL EDUCATIONAL SERVICES TO THE INDIGENOUS POPULATION IN
CHIAPAS
(ME-T1041)**

DETAILED BUDGET

Type of Expense	# of months	Cost per month	JPO	Local in kind	TOTAL
COMPONENT I: Capacity building to strengthen schools to delivery an improved bilingual education system			96,000	114,000	210,000
Activity #1 Creation of the interdisciplinary team					
<i>Indigenous teachers' collaboration in project</i>	1	-	3,000	500	3,500
<i>Consulting Fees</i>	1	3,000	3,000	-	3,000
Activity #2 Diagnosis					
<i>Indigenous teachers' collaboration in project</i>	1	-	10,000	500	10,500
<i>Consulting Fees</i>	2	4,500	9,000	-	9,000
<i>Travel</i>	1	500	500	-	500
<i>Per diem</i>	1	500	500	-	500
Activity #3 Design and implementation of bilingual training processes					
<i>Indigenous teachers' collaboration in project</i>	5	-	25,000	5,000	30,000
<i>Consulting Fees</i>	7	3,000	21,000	-	21,000
<i>Travel</i>	4	500	2,000	-	2,000
<i>Per diem</i>	4	500	2,000	-	2,000
Activity #4 Design and implementation of whole-school project					
<i>Indigenous teachers' collaboration in project</i>	9	-	43,000	108,000	151,000
<i>Consulting Fees</i>	12	3,000	36,000	-	36,000
<i>Travel</i>	7	500	3,500	-	3,500
<i>Per diem</i>	7	500	3,500	-	3,500
Activity #5 Production of bilingual materials					
<i>Production and printing of educational materials</i>			15,000	-	15,000
<i>Honorarios</i>	3	3,000	9,000	-	9,000
COMPONENT II: Analysis and Learning			16,400	-	16,400
<i>Consulting Fees</i>	9	1,600	14,400	-	14,400
Activity #1 Printing, publication, dissemination activities					
<i>Travel</i>	2	500	1,000	-	1,000
<i>Per diem</i>	2	500	1,000	-	1,000
OTHER COST			30,000	8,000	38,000
Administrative Costs					
Independent Auditing (100 hours at \$20 per hour)		-	2,000	-	2,000
Independent evaluation (200 hours at \$35 per hour)	2	500	7,000	-	7,000
Equipment (computers)		-	5,000	-	5,000
General support: (communications, materials and equipment)	24	-	16,000	8,000	24,000
TOTAL PROJECT COSTS			142,400	122,000	264,400
Contingencies	24	300	7,200		7,200
TOTAL			149,600	122,000	271,600

**IMPROVING BILINGUAL EDUCATION SERVICES TO THE INDIGENOUS POPULATION
(ME-T1041)
LOGICAL FRAMEWORK**

Narrative Summary	Verifiable Outcome Indicators	Means of Verification	Assumptions
GOAL			
To improve the local delivery capacity for bilingual education within the indigenous school system, thereby reducing systemic socio-cultural exclusion and improving academic performance in underperforming indigenous students.	<ul style="list-style-type: none"> - Statistically significant increases in academic performance in mathematics and Spanish, as measured in ENLACE¹ and in the yearly educational report by INEE.² - Increased teacher and student literacy in mother tongue. - The systematic application of whole-school bilingual projects in participating schools. - Increased sense of well-being and inclusion among students (especially in grades 1 and 2). 	<ul style="list-style-type: none"> - School academic scores as reported by ENLACE and INEE. - Pre and post evaluations of mother tongue literacy in participating teachers and students. - Documentation of teaching activity in schools (classroom observation) and reports from school principals and the supervision. - Focus group qualitative evidence on perceived changes in students. 	
PURPOSE			
<p>To form and support indigenous teacher collectives committed to the construction and implementation of best practice in bilingual education.</p> <p>To generate a model for the transformation of indigenous schools of local, state and national significance.</p>	<ul style="list-style-type: none"> - An active peer learning community of indigenous teachers focused on issues of best practice in bilingual education. - The transformation of the role of the school supervision from principally administrative to academic leadership. - Active representation of the project by participating teachers in professional exchanges, and academic and policy events. - Publications detailing the different experiences and practices generated by the project (where possible in collaboration with participating teachers). 	<ul style="list-style-type: none"> - Documentation of collective learning processes created within the project. - Focus group qualitative reports on the changing role of the school supervision. - Documentation of participation in exchanges and academic or policy events. - Copies of publications. - Progress and final report to Bank. 	<p>A highly committed school supervisor with leadership ability and a committed support team is a necessity to be able to engage schools effectively.</p> <p>Parental understanding and approval of the advantages of increased use of the mother tongue and the complementary nature of bilingualism is important.</p>

¹ National Examination for Educational Achievement in Schools.

² National Institute for Educational Evaluation.

COMPONENT 1: Capacity Building to Strengthen Schools to Delivery an Improved Bilingual Education System			
#1 Creation of the interdisciplinary team			
<p>Strengthen and empower 15 - 25 schools and their teachers through technical assistance aimed at enhance their analytical, communication, organizational, pedagogical skills and indigenous language skills.</p> <p>Develop school supervision schemes. Create inter institutional communication and collaboration system.</p>	<ul style="list-style-type: none"> - One school supervision from the indigenous education zone 710 of the highlands of Chiapas will be selected to participate in the project. - An agreement detailing mutually agreed functions and responsibilities will be produced. - The project will be presented to all schools in the supervision (18 – 25) to encourage voluntary participation. - Participating schools will sign an agreement detailing functions and responsibilities within the project. 	<ul style="list-style-type: none"> - Signed documents detailing participation, functions and responsibilities. 	
#2 Diagnosis			
<p>Participatory diagnosis of educational conditions in participating schools.</p> <ul style="list-style-type: none"> - Observation in classroom. - Interviews with focus groups. - Workshop with all participants. - Elaboration of report with conclusions. 	<ul style="list-style-type: none"> - Each participating school will have a on-going participatory diagnosis plan. 	<ul style="list-style-type: none"> - Classroom observation forms. - Taped focus group interviews. - Minutes of participatory workshop. 	
#3 Design and implementation of bilingual training processes			
<p>A multi-faceted training program that will include: observation and feedback, professional exchanges, workshops, diplomas implement by the end of the project.</p>	<ul style="list-style-type: none"> - Improved knowledge, skills and awareness in the field of bilingual education, with improved literacy in the relevant mother tongue. Self-evaluation of the learning process will be used in the form of questionnaires. - Curriculum of workshops and diplomas. - Details of professional exchanges 	<ul style="list-style-type: none"> - Participation lists of training activities. - Reports of professional exchanges. - Participators evaluations of diploma and workshops. 	
#4 Design and implementation of whole-school project			
<p>At least five bilingual projects based on knowledge acquired during the training process, and on professional experience will have been implement by the end of project execution.</p>	<ul style="list-style-type: none"> - Systematic implementation of bilingual and intercultural methodologies in the classroom. - Improved student literacy in mother tongue. - Improved performance in Spanish and Mathematics. 	<ul style="list-style-type: none"> - Documentation of whole school project proposals produced by teachers. - Comparative state evaluation results of mother tongue literacy in participating schools, as compared to non-participating schools. - Standard academic results of ENLACE and INEE. 	

Component II: Analysis and Learning			
#1 Monitoring, documentation and dissemination			
<p>A well documented teaching model for indigenous schools will be available at the end of the project.</p> <p>Baseline data on student performance in the first year and a methodology for future evaluation will be presented to the participating schools and the local education authorities by the end of the project.</p>	<ul style="list-style-type: none"> - The project will contribute to the body of knowledge in the articulation of policy and practice in bilingual indigenous education. - The project will stimulate policy debate within the Direction for Indigenous Education in Chiapas regarding the implications of its results of education policy in the state. - The project will stimulate policy debate within various federal entities (General Direction for Indigenous Education, and General Coordination of Education Intercultural Bilingüe). 	<ul style="list-style-type: none"> - Academic articles written and submitted for publication. - Presentations in academic and policy events. - Meetings to present the project with the State Direction for Indigenous Education in Chiapas. - Meetings with federal education authorities to present the project. - Report of independent meta-evaluation. - The results of A variety of instruments utilized by national and state sources(ENLACE, INEE, and INEVAL). 	<p>State and national education authorities recognize the need to assimilate and promote relevant innovation in the field of indigenous education.</p>

México
Mejorando Los Servicios Educativos Bilingües Para Los Pueblos Indígenas De
Chiapas
(ME-T1041)

PLAN DE ADQUISICIONES

I. General

La CT fortalecerá la educación bilingüe en Chiapas y contribuir a los diálogos de la política indígena en los niveles municipales y federal en México:

- i) Investigación participativa con profesores indígenas para analizar los problemas que enfrentan la educación indígena.
- ii) Diseño participativa de un proceso de entrenamiento bilingüe, y implementación
- iii) Diseño participativa de proyectos bilingües y implementación (basada en los procesos de investigación y entrenamiento) para una selección de escuelas.
- iv) Asistencia técnica y acompañamiento de los proyectos bilingües dentro de las escuelas
- v) Producción de materiales bilingües
- vi) Evaluación, documentación y disseminación de los resultados.

1. Información sobre el Proyecto

Beneficiario:	Escuelas indígenas marginadas en Chiapas	
Agencia Ejecutora:	Innovación y Apoyo Educativo A. C.	
Fuente	Monto US \$	%
BID (JPO/CBP)	149.600	57%
Local	122.000	43%
Total	271.600	100

2. Fecha de la aprobación del Plan de Adquisiciones por el Banco: POR DEFINIR
3. Fecha del Aviso General de Adquisiciones: POR DEFINIR
4. Período cubierto por el Plan de Adquisiciones: 24 meses

II. Bienes Obras y Servicios Distintos a los de Consultoría

1. *Valores de umbrales Aprobados por el Banco para la Aplicación de los Procedimientos de Adquisiciones en los Países Miembros.* Los límites establecidos para cada uno de los países sirven como base para decidir sobre la aplicación de los procesos de Licitación Pública Internacional (LPI), Licitación Pública Nacional (LPN) o Comparación de Precios (CP o Shopping), según corresponda a los límites indicados. Todas las adquisiciones sujetas a un examen previo por parte del Banco, se harían conforme se señala en el Apéndice I de las Políticas para la adquisición de Obras y Bienes.

CUADRO 1: UMBRALES BIENES Y OBRAS – (MEXICO)

	Método de adquisición	Valores de umbral para aplicación	Comentario
1.	Licitación Pública Internacional (LPI) y Licitación Internacional Limitada (LIL)	≥ US \$ 3,000,000	Publicidad en UNDB y pag. DEV/PRM
2.	Licitación Pública Nacional (LPN). (Bienes).	≥ US \$100,000 Y <US\$3,000,000	Publicidad nacional solamente
3.	LPI (Obras)	NO APLICA	
4.	LPN (Obras)	NO APLICA	
5.	LPI - Servicios distintos a los de consultoría.	≥ US \$ <u>3,0000,00000</u>	Se aplican las políticas adquisición de bienes
6.	LPN - Servicios distintos a los de consultoría.	≥ <u>US\$100,000</u> Y < US\$ 3,000,000	Se aplican las políticas adquisición de bienes
7.	Comparación de Precios (CP) -Bienes y Servicios	Menor a 100,000	
8.	Comparación de Precios (CP) - Obras	NO APLICA	

El Ejecutor y el Banco han determinado las adquisiciones que serán revisadas de manera Ex Ante. Sin embargo, al iniciar la ejecución o durante el primer año del proyecto, será evaluada la posibilidad de continuar o modificar lo establecido.

2. *Adquisiciones de Obras.*

No aplica

3. *Adquisiciones de Bienes:*

Adquisición de equipo y materiales para apoyar el proyecto. Se adquirirán dos computadoras desktop, una computadora portátil y un cañón de proyección.

4. *Adquisiciones de Servicios Diferentes a Consultoría.*

La producción de materiales bilingües

5. *Adquisición de Consultorías.*

Consultores Individuales para el establecimiento y coordinación del equipo interdisciplinario, supervisión, asistencia técnica en la educación bilingüe, el diseño y implementación de un componente de cursos de formación en la educación bilingüe, el diseño y implementación de un *proyecto de la escuela entera*, el diseño de materiales bilingües, actividades de comunicaciones, evaluación independiente del proyecto y auditoría.

La Selección de firmas consultoras para el Programa se ejecutará usando la Solicitud Estándar de Propuestas (SEP) emitida por el Banco o una Solicitud de Propuestas (SP) satisfactoria al Banco, en los casos en que la SEP no sea aplicable. En el caso de

consultores individuales, la selección se hará teniendo en cuenta lo establecido en el capítulo V de la Política GN-2350-7.

Las Listas Cortas de Consultores para servicios de consultoría con un costo estimado menor a US \$500,000 por contrato, podrán estar compuestas en su totalidad por firmas nacionales.

6. *Costos Operativos*: los siguientes costos operativos serán financiados por el Banco:

El Banco financiará los costos de contratación de un equipo de asesores para apoyar la ejecución de las actividades del proyecto, bajo un esquema institucionalizado. los consultores que se financiarán con recursos de la donación son los siguientes:

- Coordinación Técnica (1)
- Asesor Técnico Operativo (2)
- Asistente Bilingüe (1)

Los costos materiales, equipamiento y comunicaciones asociados con el proyecto. Los costos de materiales, equipamiento y comunicaciones asociados con el proyecto serán financiados con cargo con recursos de la donación (66%) y corresponden al siguiente tipo de gastos: (describir únicamente los gastos que sean elegibles)

Los restantes materiales, equipamiento y comunicaciones asociados con el proyecto, con el aporte local (34%), corresponden a los siguientes tipos de gasto: servicio de Internet, infraestructura básica como son escritorios etc.

7. *Otros*:
No aplica

8. *Contratación Anticipada y Financiamiento Retroactivo*:
No aplica.

III. Plan de Adquisiciones para Bienes y Obras

Todas las adquisiciones de Obras y Bienes financiados por el proyecto se harán conforme a las Políticas del Banco en esta materia establecidas en el Documentos GN-2349-7.

CUADRO 2: CONTRATACIÓN DE BIENES Y OBRAS

1	2	3	4	5	6	7	8	9	
No. ref.	Descripción del Contrato	Costo estimado (US \$)	Método de Adquisición	Precalificación (Sí/No)	Preferencia por elementos nacionales (bienes) (si/no)	Examen del Banco (previo/posterior)	Fecha tentativa para la presentación de las ofertas	Financiación	
Obras									
1	No aplica								
Bienes									
1	Adquisición de equipo y materiales para apoyar el proyecto	5.000	CP	No	Si	Ex Post	Junio 08	BID	
Servicios distintos de consultaría									
	Gastos de oficina y administración asociado con el proyecto	16,000	CP	No	Si	Ex Ante	Durante 2008	BID	
	Gastos de oficina y administración asociado con el proyecto	8,160--- 24000 Definir un Valor total	CP	No	Si	Seria revisión Ex Ante por que tiene un porcentaje de Financiamiento con Aporte del BID.	Durante 2008	BID	Contra partida (34%),
	Costos operativos del proyecto (transporte y viáticos)	14,000	CP	No	Si	Ex Post	Junio 2008	BID	
	Edición y impresión de materiales	6,000	CP	No	Si	Ex Post	Durante 2009	BID	
	Contingencias	7.200	CP	No	Si	Ex Post		BID	

Carolina Hill make a BID column and local contribution to make it more clear

Métodos de Selección

CP: Comparación de Precios.

CD: Contratación Directa

LPN: Licitación pública Nacional

LPI: Licitación Pública Internacional

VI. Selección de consultores

- Valores de Umbrales Aprobados por el Banco para la Aplicación de los Procedimientos de Adquisiciones en los Países Miembros.** Los límites establecidos para cada uno de los países sirven como base para decidir sobre la aplicación de los procesos de Selección con o sin publicidad internacional. Todas las adquisiciones sujetas a un examen previo por parte del Banco, se harían conforme se señala en el Apéndice I de las Políticas de Consultoría (GN-2350-7).

2.

CUADRO 3: UMBRALES CONSULTORIAS

	Método de Selección	Valores de umbral para el examen previo	Comentarios
1.	Proceso Competitivo de Selección con publicidad internacional (firmas)	≥ US \$200,000	Publicidad en UNDB y página Internet del Banco, sitio oficial de Internet del país, si existe. Revisión ex ante.
2.	Proceso Competitivo de Selección con publicidad nacional solamente. (firmas)	≥ 30,000 < US \$200,000	Publicidad en diarios locales y sitio oficial de Internet del país, si existe.
3.	Selección de Consultores Individuales por Comparación de Calificaciones	≥ US \$2,000	

El Ejecutor y el Banco han determinado que todas los servicios de consultoría de firmas superiores a US \$30,000- y servicios de consultores individuales superiores a US \$ 15,000 sean revisados de manera Ex.-Ante. Sin embargo, al iniciar la ejecución o durante el primer año del proyecto, será evaluada la posibilidad de continuar o modificar lo establecido

3. Lista corta compuesta exclusivamente por consultores nacionales. Para efectos de lo estipulado en el párrafo 2.7 de las Políticas de Consultores, la lista corta de consultores para contrataciones con costos estimados menores al equivalente de US \$200,000 por contrato podrá estar conformada en su totalidad por consultores nacionales.

4. Otros Arreglos Especiales de Selección NO APLICA

5. Plan de Adquisiciones para la parte de los Contratos de Consultoría.

CUADRO 4: CONTRATACIÓN DE SERVICIOS DE CONSULTORIA

1	2	3	4	5	6	7
No. ref.	Descripción del contrato	Costo estimado (US\$)	Método de Selección	Examen del Banco (previo/posterior)	Fecha prevista para presentación de las ofertas.	Financiación
I.	Firmas Consultoras					
1	Contratación de la auditoria financiera del Proyecto	2.000	SD	Ex Ante	Marzo 2010	BID
II.	Consultores Individuales					
1	Coordinador del Proyecto – 24 meses a US \$1.600 por mes	38.400	CCIN	Ex Ante	Mayo 2008	BID
2	Asesor técnico operativo de desarrollo de proyectos – 24 meses a US \$1.000 por mes	24.000	CCIN	Ex Ante	Mayo 2008	BID
3	Asesor técnico operativo de desarrollo de proyectos – 24 meses a \$1,000 por mes	24.000	CCIN	Ex Ante	Mayo 2008	BID
4	Asistente de Proyecto Bilingüe – 12 meses a \$500 mensual	6.000	CCIN	Ex Post	Mayo 2008	BID
5	Ex post evaluación independiente	7.000	SD	Ex Ante	Mayo 2009	BID

Métodos de Selección

Firmas Consultoras:

SBC: Selección Basada en la Calidad.

SBMC: Selección Basada en el Menor Costo

SBPF: Selección Basada en Presupuesto Fijo

SCC: Selección Basada en las Calificaciones de los consultores

SD: Selección Directa

SBCC: Selección Basada en Calidad y Costo (80-20 o 70-30%)

Consultores Individuales:

CCIN: Selección por comparación de calificaciones, consultor nacional.

CCII : Selección por comparación de calificaciones, consultor internacional.

Publicidad:

internacional: UNDB *online* Página y Internet del BID. (contratos \geq US\$200,000).

nacional: periódico de amplia circulación nacional o la Gaceta Oficial (si está en el internet), o en el sitio de Internet único oficial del país dedicado a la publicación de avisos de licitación del sector público (si existe).

6. Actividades de Formación de Capacidad en los Organismos Ejecutores y Calendarios previstos.

Cuadro 5: CAPACIDAD INSTITUCIONAL DEL EJECUTOR

No. de Actividad	Descripción de la Actividad/Resultado esperado.	Costo Estimado US\$	Duración Prevista	Fecha de Inicio	Comentarios
01	Capacitación en Procedimientos de adquisiciones y Finanzas		1 día		Se realizará en la Representación del BID en México , dentro del primer mes de iniciado el proyecto
02	Asistencia Técnica en adquisiciones		Permamente		Vía Telefónica / Vía E-mail