Low-Fee Kindergartens ("KG2s") in Jordan

Current Landscape and Role in KG2 Universalization

January 2024

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Abbreviations

CBO	Community-based Organisation
DoS	Department of Statistics
ECED	Early Childhood Education and Development
EMIS	Education Management Information System
ESP	Education Strategic Plan
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
HRD	Human Resource Development
KG	Kindergarten
MoE	Ministry of Education
MoITS	Ministry of Industry, Trade and Supply
MoSD	Ministry of Social Development
OECD	Organisation for Economic Co-operation and Development
PD	Professional Development
QRC	Queen Rania Center for Education Technology and Information
QRF	Queen Rania Foundation
RAMP	Early Grade Reading and Mathematics Project
SDG	Sustainable Development Goal

Acknowledgements

Background

The Importance of Pre-Primary Education

The early years of a child's life build the basis for their lifelong growth, and children who fall behind in these years often struggle to catch up with their peers (UNESCO, 2023). To this end, and under the auspices of the United Nations Sustainable Development Goal (SDG) 4, the global community has agreed that "by 2030… all girls and boys have access to quality early childhood development, care and pre-primary education so that they are ready for primary education" (United Nations, "Targets and Indicators" section). Key to this commitment to universal pre-primary education is inclusion, since many children from vulnerable backgrounds, including refugees and those with disabilities, are deprived of their right to education (UNESCO, 2023).

The Hashemite Kingdom of Jordan has embraced the commitment to SDG Target 4.2, with a national objective in the 2016 Human Resource Development Strategy (HRD) to "ensure that [by 2025] all children have access to quality early childhood learning and development experiences that promote primary school readiness, ensure healthy lives, and promote their future wellbeing" (p.17). The first project listed under this objective, Early Childhood Education and Development (ECED) 1.1., is to "increase KG2 [kindergarten] capacity and enrollment" with a 10-year target of 100% KG2 enrollment (p.25-26).[1] This ambitious target was reinforced by the Ministry of Education (MoE)'s Education Strategic Plan (ESP), 2018-22[2] (MoE, 2018), and has served as a driving force for efforts to expand early childhood learning across the Kingdom. The newly established Economic Modernisation Vision (Government of Jordan, 2022) reiterates the strategic importance of the early childhood sector in Jordan, including universalization of both KG1 and KG2 and picks up on an aspect of KG2 provision that was already a strategic focus of the HRD Strategy, ESP and other planning efforts: non-governmental kindergarten provision. Given the lack of resources to make free public KG2 accessible for all, and building on the longtime private provision of KG2 in many areas of the Kingdom, national strategies are aligned on the importance of better supporting and utilizing private KG2 provision to make universalization possible.

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[1] In Jordan, the kindergarten stage begins at age 4 and lasts for two years. The first year is referred to as "KG1" and the second year is referred to as "KG2."

[2] The Plan has since been extended until 2025.

Kindergarten in Jordan

Kindergarten has existed in Jordan for more than a century but was not introduced as a formal educational stage (under Education Law No. 3) until 1994. It remains non-compulsory for both KG1 and KG2 (MoE, 2022a, p.2). The MoE categorizes kindergarten enrollment into three sectors (MoE, 2022a, p.3):

- **Public**: these are mainly kindergartens operated by the MoE, but also include kindergarten-level classes in military-operated schools.
- **Private/"voluntary":** these are primarily private/for-profit schools or programs, which are registered with the MoE, but also include some non-profit kindergartens which are operated by community-based organizations and are registered with the Ministry of Social Development (MoSD). Most of these are licensed, but some are only registered without up-to-date licenses.
- **Unofficial/Non-formal:** these include any kindergarten in operation which is neither licensed nor registered with the MoE or the MoSD.

Until recently, most students in Jordan who attended KG2 did so at non-public KG2s, but government efforts have led to an increase in overall KG2 enrollment as well as the proportion enrolled in the public sector. In the 2018-19 academic year, the MoE reported the overall number of students enrolled in KG2 at 106,403, with 35% enrolled in MoE and 65% enrolled in private schools (MoE, 2020, p. 59). The MoE also tracks enrollment in other governmental KG2s (mainly those operated by the military), but these typically enroll fewer than 200 students per year. Three years later, the MoE had documented enrollment of 121,917 students in KG2 across the Kingdom. A little over half of these (56%) were enrolled in MoE schools, and the remainder (44%) were enrolled in private schools (MoE, 2023a, p.57). Assuming that the total number of KG2 age children is similar to the 2020-21 figure noted in Strategic Plan for Universalizing ECED – 172,000 – the total enrollment rate for KG2 in is around 71% (121,917/172,000).

Equity and Inclusion

When looking at expansion and access to KG2 in Jordan, it is important to consider which groups are particularly vulnerable to exclusion. In 2022, the MoE and Higher Council for the Rights of Disabilities, along with other national and international stakeholders, convened to reiterate the national commitment to inclusive and equitable education under SDG 4 and to agree on the following definition for inclusion and diversity in education:

> *Systems, political will, and commitments by all key partners and stakeholders are in place to guarantee that all students regardless of their gender, abilities, disabilities,*

backgrounds, and circumstances have equal and equitable access to quality education in their home or host communities, with learning environments that embrace diversity and support their participation and achievements towards reaching their full social, emotional, physical, and cognitive potentials (MoE, 2022c, p.2)*.*

This commitment reinforced an awareness among leaders of key national institutions around the importance of inclusivity in education, including in the early years. The Plan for Universalizing ECED reinforces this, with the strategic objective to "enable equitable access and accommodate all KG2 school children in the public and private sector, including vulnerable ones" (p.9).

However, as stakeholders in Jordan work towards this vision, disparities in current enrollment persist. The 2017 RAMP survey of families found that Jordanian children had attended KG2 at significantly higher rates than Syrian children in 2016-17 (92% of Jordanians compared to 52% of Syrians) (DeStefano et al., 2018, p.4). The MoE reported in its ESP Midterm Report that while the proportion of Syrian children enrolled increased significantly between 2017-18 and 2019-20, disparities persist (MoE, 2022b). The MoE has also noted a smaller gender gap in KG2 enrollment of about 1.2 percentage points in favor of boys (MoE, 2022b, p.15), although data from the Department of Statistics indicates that 48.6% of 5-year-olds in Jordan were female and 51.3% were male (Department of Statistics (DoS), 2023), suggesting that this gap may not indicate disproportionate access rates. Recent data on KG2 enrollment rates for other vulnerable groups, such as students with disabilities, is not available in the Education Management Information System (EMIS) or DoS datasets, an indication that investment in data systems would be needed to support further efforts on this front. Given these challenges, the inclusivity of low-fee KG2s is an important strand of the present study.

Strategies and plans for expanding KG2

In 2018, the MoE launched the ESP, a new strategic plan, under which one priority domain is ECED (MoE, 2018). The first component of the ECED priority domain addresses 'Access and Expansion', and key actions include research on the situation of kindergartens, renovation and construction of MoE KG2 classrooms, renovating private school classrooms, hiring qualified teachers, and re-examining the by-laws and regulations of public and private kindergartens to facilitate opening of private kindergartens (MoE, 2018, p.24). By 2022, the MoE reported in its ESP Midterm Review that there had been considerable progress on most of these objectives: 246 public KG2 classrooms were constructed, and public KG2 classrooms were renovated, and 686 private school classrooms were renovated (MoE, 2022b, p.15). Enrollment rates consequently increased, despite considerable disruption due to the COVID-19 pandemic, which had a

disproportionate impact on private KG2s. In Amman alone, 37 private kindergartens permanently closed during the 2020-21 school year (MoE, 2022b, p.16).

Regarding regulations and licensing for the private sector, an amendment to bylaws on KG establishment was made in 2019, which reduced establishment and renewal fees for CBOs and simplified outdoor space regulations. It also included a new regulation that private kindergartens must obtain approval of the MoE before raising tuition. Work began with the World Bank and the Ministry of Industry, Trade and Supply (MoITS) to develop a licensing system for the private education sector that would simplify procedures for providers, but the 2022 Midterm Report noted that this process had been significantly delayed. In addition, policy options for how to treat the private KG2s which do not meet MoE standards following the sectoral license review had not yet been developed. Delays have also occurred in financial assessment of policy options and financial analysis for partnering with the private sector on KG2 expansion more broadly (MoE, 2022b, p.17).

The MoE has articulated more detailed KG2 expansion plans in its "Strategic Plan Concept for Universalizing ECED in the Education System in Jordan"[3] (MoE, 2022a). The Plan consists of 11 strategic pillars (Table 1).

Table 1: Pillars in the MoE Strategic Plan for Universalizing ECED*

Assessment
Policy
Curriculum and E-Learning
Public Private Partnership (PPPs)
Learning Quality
Capacity Building and Training
Monitoring and Evaluation
Infrastructure and Resources
Capacity Increase
Awareness and Parental Involvement
Institutional Performance

*bolded areas contain plans for expanding KG2 access

Four of these pillars contain specific plans for expanding KG2 access: the Capacity Increase pillar, the Public Private Partnership (PPPs) pillar, the Infrastructure and Resources pillar, and the Policy

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[3] This will be referred to as the "Strategic Plan for Universalizing ECED" for the remainder of this report.

pillar. Collectively, these four pillars contain strategies to expand affordable private sector provision that have been used elsewhere in the world, with promising results, including:

- **Partnerships to subsidize KG services at some non-public providers:** This was the path taken in South Africa, which has increased financial support for both public and private early childhood development centers through direct transfers to public centers and "partial subsidies" to private centers (Shanker et al., 2015). A similar approach has also led to "dozens of franchises" emerging in India (Gupta, 2018).
- **Vouchers or subsidies for vulnerable families to enroll their children, especially those with disabilities:** Providing partial subsidies for vouchers only for providers meeting specified quality standards and whose fees are affordable, can expand options for families while increasing provider motivation to meet quality standards and maintain affordable tuition (Kraft et al, 2018; OECD, 2017).
- **Reviewing and adopting new regulations for establishing and licensing private KG institutions:** This approach is supported by global research, including a study of private sector provision in Kenya. However, regulations must be supportive and not create unnecessary barriers to entrance or sustainability of private as one report noted: "standards that are untenable or that take a punitive approach may discourage non-state providers from entering the market, limit innovation, or decrease the breadth of services provided" (Kraft et al., 2016, p.7).

Additional key elements for expanding private KG2 provision under the Plan for Universalizing ECED include establishing a policy dialogue between government entities and registered and unregistered providers, partnering with private providers to use their space to provide public KG2 services (potentially as a second shift) or to use both their spaces and teachers to do this (i.e. a charter school model). One strategy highlighted in the literature that was not mentioned in the ESP or the Strategic Plan for Universalizing ECD is the strategic use of soft loans and tax facilities (Kraft et al., 2016, p.7). Providing financial support or tax breaks for private sector providers in the start-up phase or who need to make significant investments to meet new quality standards could support the expansion and sustainability of the private KG2 sector.

"Quality" in pre-primary education

Quality is a key component in early childhood education, so much so that evidence suggests that low-quality pre-primary education is sometimes found to have no benefits for child development (Britto et al., 2011). Given this, ECED Quality was the second component of the ESP's ECED priority domain, calling for the adoption of a quality assurance framework, accreditation standards, awareness raising, increasing the percentage of qualified teachers, and adoption of

an accountability system (p.25). The ESP Midterm report reflected mixed progress towards these goals. While the goal of increasing the percentage of qualified teachers was met by 2019-20, with 98% of public school teachers qualified, comparable data for private KG2 teachers was not available. A unified quality assurance system for both public and private KG2s was developed in 2019-20 by the MoE. This framework includes accreditation standards and is expected to be adopted by 2025 (MoE, 2022b, p.18). The Plan for Universalizing ECED further specifies some actions required to implement this quality assurance system among private providers, including, ensuring awareness among all providers, and piloting the system with both public and private schools (MoE, 2022a, p.15).

In conclusion, the Jordanian government recognizes the importance of ECED and is committed to universalizing access to KG2 for all students by 2025. This goal will be achieved through reforms in policy, expansion of KG2 infrastructure and resources, and private-public partnerships, all which will aim to increase the capacity of the KG2 sector to enroll all children in KG2 programs. In the drive to do this, the MoE and partnering stakeholders are paying particular attention to the quality and inclusiveness of KG2 and, in moving forward, striving to ensure KG2 provision is made available to vulnerable populations that have been excluded from services in the past. Toward this end, the following chapter will examine the objectives and design of the present study which assessed the demand-supply gap within the low-fee private KG2 providers and potential for expansion and collaboration with the MoE to ensure universal access.

Objectives

The Assessment pillar of the Strategic Plan for Universalizing ECED includes the objective to "develop a demand and supply gap assessment to compare supply versus demand of KG2 of public and private sector to review KG2 expansion priority, focusing on where the service is needed most including children with special needs" (MoE, 2022a, p.12). While the MoE has strong systems for tracking the status, enrollment, and other aspects of public KG2s as they expand, less is known about the situation of the private sector.

Study Objectives and Approach

The overall aim of the study was to better understand the state and reach of private sector kindergarten (KG2) provision and explore strategic ways that the MoE could engage and collaborate with private KGs to work toward the universalization of KG2. More specifically, the study aimed to assess whether low-cost private KG2s can support the MoE in universalizing access, particularly in reaching vulnerable populations that are currently unenrolled in KG2. The study considered the myriad of social, economic, and political factors that shape the private

sector's KG2 provision and examines the barriers, enablers and opportunities for meaningful collaboration in the future between the work of the low-fee private and public sector in the field of KG2.

Objective 1: Assess the quality and inclusivity of KG2 private sector provision in Jordan

Research questions:
1. What is the current situation of low-fee private and non-profit/community-based organizations' (CBOs) KG2s in terms of quality, capacity, registration and licensure status, and long-term sustainability?
2. How inclusive are these private sector providers of KG2 in terms of making their services available to disadvantaged and vulnerable children including refugees and those with disabilities?
3. What are the strengths, weaknesses, opportunities, and challenges facing these private providers of KG2?

Objective 2: Determine how the MoE and low-cost private sector (including low-fee and non-profit providers) may work together to universalize access to KG2 in the coming years

Research questions:
4. How does the MoE plan to work with low-cost private providers of KG2s (both low-fee and non-profit)?
5. What are private sector KG2 providers' views and attitudes towards current government regulations and working with the government in the future to universalize access to KG2 provision?

The subsequent section describes the methodology employed to achieve these objectives.

Methodology

Definition of "Low-Fee" KG2

At the outset of the study, the research team acknowledged the importance of defining or establishing a threshold for "low-fee" schools, particularly in the context of private KG2s and CBOs. This definition was crucial to sampling strategy for data collection. Due to the absence of an official definition of "low-fee" KG2 schools by the government, the researchers reviewed

several key factors, including average family income and data on households' willingness to pay for KG2. In addition, during discussions held in December 2022, MoE officials in the Private Education department indicated that they considered the threshold for "low-fee" KG2 to be 50 JODs or less. The definition of low-fee private KG2 was ultimately determined to be those charging 50 JODs or less per month for a child's place. For greater details on this rationale (see Appendix A). Also note, for many households in Jordan, fees of 50 JOD per month is very high, and for some, any fee at all is untenable. This issue is addressed in the analysis (see the "Fees" section of this report).

Mixed-methods Approach

A mixed methods research approach was utilized for this study, with the main components of the study being: (1) a quantitative survey of low-fee KG2 providers, including CBO-based KG2s, (2) key informant interviews (KIIs) with 12 KG2 principals and owners, and (3) KIIs with 6 MoE policy-makers working with the KG2 sector. The survey and interviews of KG2 providers were limited to six governorates: Amman, Balqa, Irbid, Mafraq, Zarqa, and Karak. These governments, except for Karak, were chosen due to their high number of Syrian refugees, a demographic that has less access to KG2. Karak was included to represent comparative data from a governorate in the south. For more details on the Sampling Frame (see Appendix B).

Quantitative Survey

The survey was administered in-person to 648 KG2s that were identified and confirmed to offer low-fee or no-fee KG2 provision in the selected six governorates. These face-to-face surveys were conducted from May to June 2023. The sample of 648 KG2s represent all private and KG2s in the selected governorates that indicated they provided KG2 or charged fees of 50 JOD or less per month and were visited in person at least once.

Prior to data collection, QRF sought to accurately determine the population of private KG2s and the fees they charged in the six governorates. To achieve this, data collectors reached out by phone in April 2023 to every potential low-fee KG2 they could identify in Jordan based on lists of KG2s obtained from the Ministry's EMIS, which included a total of 1,554 private KG2 providers. Identifying CBOs providing KG2 services was more difficult as the governance of CBOs is distributed across the MoSD, the Ministry of Industry, Trade and Supply (MoITS), the Ministry of Municipalities, and other institutions. Thus, the research team compiled a comprehensive list of 133 CBOs providing early childhood services from data provided by Plan International Jordan (2022)[4] and the German Agency for International Cooperation (GIZ). These CBOs were then called

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[4] Plan International Jordan conducted a study in 2021-2022 to identify and better understand the situation of CBOs providing Early Childhood Development services "Situation Analysis of Grass Root Organizations Working in Early Childhood Development in Jordan Final Report" (unpublished).

to assess if they offered KG2 and met the study criteria. More details on this population verification process can be found in (Appendix C). During data collection, an additional 219 private KG2s and 25 CBO-based KG2s were identified, increasing the total population (in the six governorates) of private KG2s from 1,554 to 1,773 and the total number of CBOs from 133 to 158.[5] Combined, there was a total population of 1,931 private KG2s and CBOs, of which 660 (34%) were found to be in scope and 648 participated in the survey.

Table 2: Sources of Potential KG2s and Percentage Confirmed In-Scope

Sector	Source	# of Potential KG2s	# confirmed in scope	% confirmed in scope
Private	MoE	1554	457	29%
	Identified by data collection vendor	219	135	62%
	Total	**1773**	**592**	**33%**
CBO	PLAN international/GIZ	133	52	39%
	Identified by data collection vendor	25	16	64%
	Total	**158**	**68**	**43%**
Overall		**1931**	**660**	**34%**

The questionnaire for the quantitative component was primarily developed by the Queen Rania Foundation (QRF) with input from the MoE. Questions were drawn from existing global instruments such as the Early Childhood Environment Rating Scale - Revised Edition (ECERS-R) and the European Quality Framework for Early Childhood Education and Care (EQF), as well as the questionnaire from QRF's 2015 study of nurseries in Jordan (QRF, 2018).

More details on the quantitative survey can be found in (Appendix C).

Qualitative Interviews

To gain a more in-depth understanding of the challenges and work of KG2 providers, a total of 12 Key Informant Interviews (KIIs) were conducted in-person during July 2023 with owners and management of low-fee private and non-profit/CBO-based KG2 from the six targeted governorates. These KG2s were selected at random by QRF from the telephonic interviews output list, ensuring there was representation across the six governorates. A total of 9 private

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[5] These were identified by enumerators who ran online searches, thoroughly surveyed the governorates both visually when they visited in-person, and via word-of-mouth over the course of the interview process to identify any additional private KG2s in the targeted governorates that might not have been included in the MoE lists.

KG2s, across all six governorates and 3 CBO-based KG2s (one each in Amman, Irbid, and Mafraq) were ultimately conducted. The KIIs with KG2 providers, which were all conducted in-person except for those in Karak which were online, aimed to gain a more in-depth and critical understanding of the challenges, perspectives, and realities of their work and circumstances.

To assess how policy-makers' perspectives on KG2 universalization, a total of six qualitative KIIs were also conducted with key stakeholders at the MoE in July 2023. First, QRF first identified the key MoE staff involved in planning for the KG2 sector, then developed discussion guides, and finally conducted interviews face-to-face online. Interviewees included members of the MoE's Early Childhood Development department, the Educational Training Department, the Planning department, the Private education department, and Legal and regulatory affairs Affairs, the Queen Rania Center.

Data Analysis

All data analysis was conducted by QRF. The research team utilized exploratory, descriptive, and inferential statistics to interpret the survey results. For more detail on the quantitative analysis methods (see Appendix D.) In addition, QRF reviewed the interview audio recordings, transcribed highlights, and thematically analyzed the responses. Results of both the quantitative and qualitative analysis relating to each key research question were compiled and compared to identify where one data source corroborated or enriched understanding of the other.

Study Limitations

There are some notable limitations of this study. First, there are limitations with respect to the sample. The sampling frame was limited to KG2s known to the MoE and its partners, since knowledge of unregistered KG2s is extremely limited[6] as unregistered KG2s, by definition, do not appear in the EMIS or MoSD records.[7] While many KG2s not initially on the MoE or Plan/GIZ lists were found and incorporated in the study, there will be others that were not found. A related issue is that KG2s who were registered but unlicensed or who were not fully complying with government regulations may have been most likely to refuse to participate, out of concern that providing information about this could lead to fines, closure or other consequences. While efforts were made to reassure them that no information would be passed to other entities without their consent, this may nevertheless have introduced some selection bias to the study, if higher-quality KG2s in compliance with regulations were indeed more likely to participate.

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[6]QRF has actively engaged in discussions with external stakeholders who possess prior experience in conducting similar research projects in Jordan

[7]Given the 2018 RAMP study, which suggested that many children may indeed attend such unregistered or unofficial kindergartens, the study authors were contacted to see if there might be any clues from their study which might aid in efforts to reach these unregistered or unofficial kindergartens. However, since the RAMP survey was conducted with families, it did not gather kindergarten names or addresses.

A second limitation that arose during data collection was a number of respondents voiced concerns regarding the length and/or specific parts of the questionnaire. With an average duration of around 40 minutes, several KG2s considered it to be excessively long, and this may have affected the response rate or accuracy of responses towards the end of the questionnaire. Some respondents also expressed objections to specific questions included in the questionnaire. In particular, respondents raised concerns about inquiries concerning student numbers, school facilities, and finances - especially regarding salaries and wages - some saying the questions were too personal or sensitive, and others simply questioning their relevance. More than half of administrators said they were not aware of the monthly costs incurred by the KG2; while in some cases this may have been because the respondent was not the individual responsible for finances, others may have responded this way to avoid discussing what they viewed as a private matter for the school.

In addition, fears regarding confidentiality as well as social desirability bias may have led some respondents to report KG2 conditions corresponding to government expectations, particularly with respect to licensing status, teacher qualifications, physical environment, inclusiveness or any issue which is monitored by government agencies as part of their regulatory processes.

Finally, there is a limit to what surveys and interviews can show about the quality of internal processes within a KG2, and especially inside of classrooms. Some scholars of pre-primary education have referred to two aspects of quality: *structural quality* (e.g., low student-teacher ratios, teacher training and pay) and *process quality* (e.g., the warmth, responsiveness, instructional rigor) (Britto et al., 2011). The methodology of this study is much better positioned to capture information on the former than the latter.

Findings

The State of Low-Fee and CBO-based KG2s

The following section addresses the first research question which is exploratory in nature and considers the current situation of low-fee private and CBO-based KG2s in terms of quality, capacity, registration and licensure status, and long-term sustainability. First, the section looks at the geographic spread of these KG2s in the six targeted directorates while also considering their licensure status. The key insight here is the fact that most KG2s surveyed were licensed and the most KG2s, both low-fee and CBO-based, were found in the urban centers of Amman, Irbid, Zarqa. Related to licensure, the section then considers the fees that KG2s face in this process as well as other fees with which private KG2s also must often grapple. Next, the section considers enrollment in these KG2s and then considers the multiple factors that might be used as indicators

of quality and how the data might be considered by the MoE for future partnerships to universalize KG2 access.

Number and Geographic Distribution of Low-Fee KG2s

Out of a pool of 1,773 identified private KG2s and 158 CBO-based KG2, a total of 593 private and 68 CBO-based KG2s were confirmed to offer KG2s services for 50 JODs monthly or less, or a total of 661.[8] Two-thirds (66%) the low-fee KG2s identified were located in Amman and Irbid (Figure 1), with an additional 20% in Zarqa. The remaining 14% were distributed across Balqa, Mafraq and Karak.

Figure 1: Location of low-fee KG2s reached
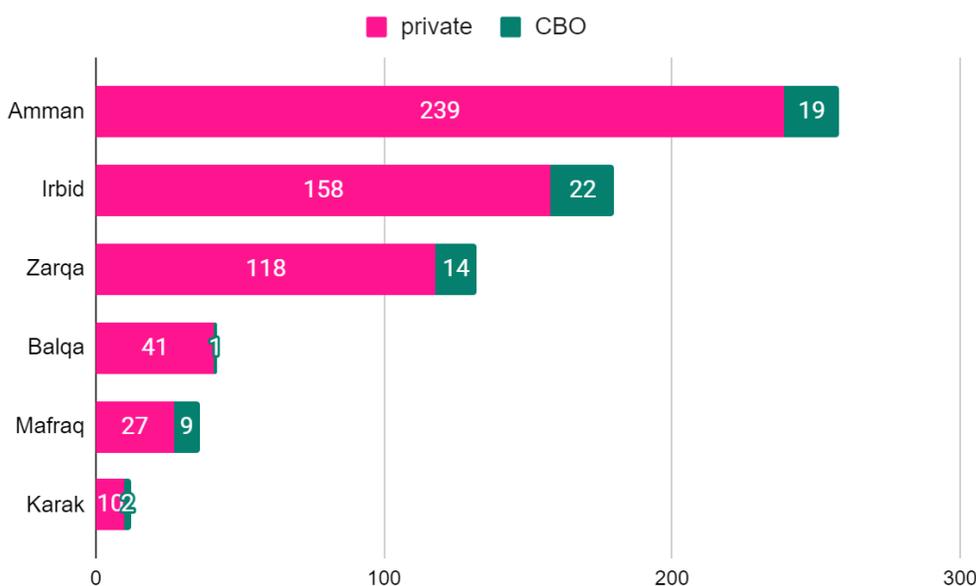
Licensing and regulatory requirements

The Policy pillar of the Strategic Plan for Universalizing ECED recommends reviewing and adopting new regulations for establishing and licensing private KGs, and the Public-Private

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[8] Note: The minimum number of low-fee private and CBO-based KG2s in operation is thus 660, while the maximum number is likely to be under 1,000, assuming the proportion of the unconfirmed 285 locations# who do not provide low-fee KG2s services is similar to the proportion for those that were reached (51%). A further piece of evidence that many of the 285 unconfirmed locations may not be operational is that 43% of the 285 unconfirmed locations could not be reached at available phone numbers after 3 attempts.

Partnerships pillar recommends operationalizing new simplified licensing procedures. Findings highlighted the continued importance of these recommendations to encourage KG2s to become licensed. Nearly all (96%) KG2 administrators surveyed said that their institution was licensed.[9] There were no statistically significant differences in reported licensing rates by enrollment level or the number of years in operation. In fact, the average unlicensed KG2 was reported to be in operation for 21 years, while the licensed KG2s had been in operation for 17 years on average. However, there was a significant difference in licensing rates by KG2 type: only 83% of CBO-based KG2s were licensed, compared to 98% of private KG2s (p<.001).

Table 3: Low-fee KG2 characteristics, by reported licensure status

	Licensed	Unlicensed	All
Number of KG2s	625	23	648
Average enrollment	50.6	43.7	50.4
Average years in operation	17.4	21.4	17.5
% CBO-based	7.4%	39.1%	8.5%
% private	92.6%	60.9%	91.5%

All of the 12 KG2 administrators interviewed described the KG2 licensing process as a challenge. According to interviewees, the licensing process requires a number of time-consuming steps involving different regulatory bodies. KG2 owners and administrators described how they had to visit multiple government offices in different locations in order to acquire signatures and pay fees. In addition to the standard licensing fees, there were a number of other fines and costs which KG2s might be required to pay in order to obtain licensing. Low-fee KG2s most frequently reported engaging with the MoE, MoH, municipalities, and Civil Defense Department during the licensing process in the survey. Figure 2 shows the percentage of low-fee KG2s visited by different regulatory bodies during the licensing process, with private KG2s reporting these visits at slightly higher

"It is as though all these demands by the various institutions are telling us to close the KGs and go home."

- Private KG2 administrator

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[9] The MoE provided QRF with a list of 81 private KG2s that did not renew their license for the 2022-2023 academic year. Nineteen of these KG2s were surveyed. Only two reported that they were not licensed whereas the other 17 reported that they were licensed. While this could be due to errors in administrative data or in the data collection for this study, it could also indicate some acquiescence bias or hesitation among KG2s to provide full information on sensitive issues such as licensure during the surveys.

rates than CBO-based KG2s. Moreover, KG2 administrators operating under CBOs had some advantage, as they described that often the kindergarten was automatically able to operate if the CBO itself had the appropriate license, or they were under somewhat less scrutiny due to this affiliation. However, even CBO-based KG2s had experienced some challenges, particularly with more recent regulations from the Ministry of Health. In addition, a higher proportion of CBO-based administrators than private KG2 administrators reported that licensing and regulations were their most pressing challenge (5.5% compared to 1.5%).

Figure 2: Percentage of Low-Fee KG2s visited by regulatory bodies during licensing process, by KG2 type
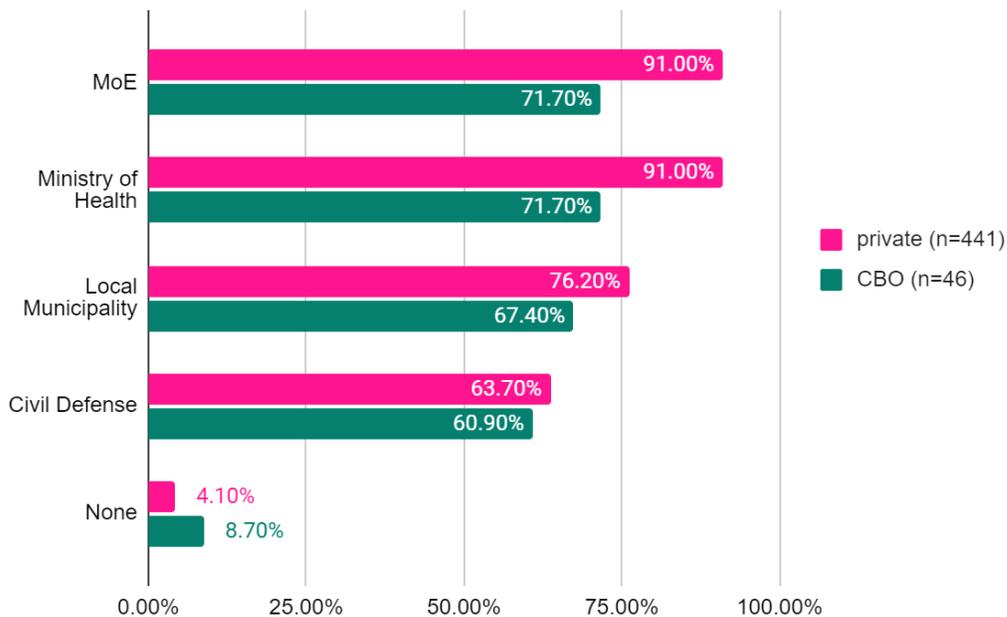
The qualitative interviews provided more insight on how KG2 owners and administrators experienced these interactions with regulatory bodies and their fees and stipulations. Some of the points discussed were as follows: [10]

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[10] These fees and requirements were confirmed in official MoE documentation (MoE, 2015), provided by MoE on the 26th September 2023.

- **Licensing fees to the MoE:** (100 JOD) to be paid by August each year, following completion of all other licensing requirements.[11] Meeting the August deadline was considered challenging for some KG2s, given the number of time-consuming steps involved before being able to obtain licensure.
- **Payments to the MoH:** to cover fees for doctors and dentists. While the doctor's fee is a one-time payment of 25 JOD, it was noted that the dental fee was on a per student basis (3 JOD per student)[12] and thus costs some KG2s more than 500 JOD a year. Most KG2 administrators felt this was an unfairly high charge, given that the dentist would only visit the school once a year, and then only to conduct check-ups rather than actually treat students. Some also commented that this regulation did not benefit families, who tend to have their own private, public, or military insurance.

> *"Why should I pay 500 JODs for a dentist if he only comes to tell me the students have tooth decay? What's the point if the parents will have to go treat it on their own later on?"*
>
> - private KG2 administrators

- **Fines to the Municipality or Civil Defense Department**: required if KG2 indoor and outdoor spaces did not strictly meet regulations for the amount of space, ventilation, lighting, etc. Some KG2 owners perceived these regulations to be implemented overly strictly, as they were fined up to thousands of dinars for missing space requirements by just a few centimeters. One KG2 administrator recounted that they were appalled when they were forced to pay the Municipality 90 JOD to erase drawings of Mickey Mouse on their gate of the KG, which from their perspective were important for creating a colorful, welcoming environment. However, the municipality regulations did not allow external building facade decorations, according to the respondent.
- **Fees to the Municipality:** for garbage collection. Some KG2s noted that official garbage bins were not always provided.
- **Documentation of teacher contracts and salary slips to MoE and Social Security:** Some KG2 administrators noted that providing the salary slips in particular was a challenge, sometimes due to cash flow issues where they could not pay salaries on time, and at other times they had informal arrangements with teachers where they would provide them with advances and deduct this amount from their salary at the end of the month.
- **Providing enrollment and other data to MoE for the EMIS:** A few KG2 administrators mentioned this requirement was challenging. From the MoE perspective, this process is extremely important for identifying where expansion of KG2 is needed, and the MoE has

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[11] This fee amount was confirmed by the MoE (September 2023).
[12] According to MoE officials (as of September 2023), this regulation is currently under review and may be revised.

so far found many private sector KG2s uncooperative in providing an accurate count of students enrolled. One reason for this may be the fees placed upon KG2s (such as dental fees), are calculated on a per-student basis, and this creates an incentive for KG2s to under-report their enrollment. Another reason for the lack of cooperation may be related to some KG2s enrolling more students than legally permitted given the physical capacity of their space or due to constant fluctuation in enrollment numbers.

- **Bus licensing fees to the Ministry of Transportation:** Buses need to be annually licensed matching certain criteria specifically regarding safety of the vehicle. Non-licensed buses are not allowed to be operating.

A few suggestions for improving licensure and regulation arose during the qualitative interviews with policy-makers. One MoE interviewee suggested having a "one stop shop" to allow non-public KG2s to do all of their licensing paperwork every summer. Another MoE interviewee noted that challenges arise from having so many different entities involved, and recommended that MoE could take the lead in bringing together these different entities to collaborate on improving the process.

Student Enrollment

Collectively, the 648 low-fee KG2s surveyed served 32,656 students in the 2022-2023 school year (Figure 9), representing approximately 24% of the total enrollment (32,656/138,738) (MoE, 2023c) in the year 2022-2023. Most low-fee non-public KG2s in Jordan serve 60 students or fewer. The typical private low-fee KG2 had three classrooms and about 40 students enrolled (the median was 41). Most CBOs also had three classrooms but served more students, with a median of 50 students enrolled. The size of low-fee KG2s varied by governorate (p<.05), with larger enrollment levels in Zarqa (median=49), Irbid (median=45), and Balqa (median=45). About half of low-fee KG2s reported that enrollment had decreased since the COVID-19 pandemic, while about 37% said enrollment had increased and 12% reported no real change in enrollment. Qualitative interviews suggest that enrollment drop is attributable to the economic situation of most families, which was negatively affected by COVID-19. Furthermore, the extended periods of parents staying at home during COVID-19 restrictions meant they had no need to drop their children to KG. This change in enrollment due to Covid highlights how enrollment in low-fee KG2 is very closely linked with families' economic situation and ability to pay fees. Hence, the low-fee KG2 provision is the key sub-group of the sector that may have the potential to reach the lower socioeconomic groups such as Syrian refugees that cannot otherwise afford private KG2 provision.

Quality

Research from around the world suggests that simply granting access to pre-primary education is insufficient for improving children's developmental outcomes. Instead, pre-primary programs must reach sufficiently high levels of quality in order to generate meaningful changes in children's early learning and development (Raikes et al., 2023; Kim et al., 2022). Quality is also important for achieving equitable outcomes, and equity within early childhood programs has been conceptualized as a product of both access and quality (Britto et al, 2011). Learning Quality is therefore a key pillar of the Strategic Plan for Universalizing ECED, including the development, piloting, and operationalization of KG2 quality system standards (p 14).

To learn more about learning quality in low-fee private KG2s, quality issues such as staffing, curricula, learning materials, physical environment, and monitoring of student attendance and learning outcomes were addressed in both quantitative and qualitative interviews. While it is difficult to asses *process quality* (the warmth, responsiveness or instructional rigor provided by teachers in classrooms) in self-reported interviews, the data gathered in this study suggest that low-fee private KG2s are strong in many of the dimensions of *structural quality* such as staffing and the physical learning environment. However, these results are just one information source on this issue and should be interpreted in the context of administrators' incentives to portray their schools in the most positive light, especially given regulatory requirements related to the physical KG2 environment.

Staffing

To provide access to quality KG2, it is important that private providers have sufficient staff that are qualified and/or experienced in their teaching roles. MoE regulations require KG2 teachers in the private sector to have a bachelor's degree in Education, an indicator of workforce quality. According to the qualitative interview data, there was consensus among low-fee KG2 administrators that finding qualified teachers was not a major challenge. In terms of size of staff, low-fee KG2s reported an average of three KG2 teachers and one administrative staff member (Table 4). In addition, low-fee KG2s have on average one teacher for every 19 students (19:1 student:teacher ratio). According to the MoE standards, the student:teacher ratio for KG2 should be a maximum of 25:1. At least 86% of low-fee KG2 schools meet this standard. This indicates that the low-fee private KG2 sector is not over-crowded but in line with the MoE's expectations in terms of class size and supervision.

Table 4: Average number of KG2 staff, by school type

|	Private	CBO
Average number of KG2 teachers	2.7	2.7
Average number of KG2 instructional support staff (e.g. teacher aides)	0.5	0.5
Average number of KG2 non-instructional support staff (e.g. education media specialists, psychologists, nurses)	0.3	0.21
Average number of administrative support staff (e.g. secretaries, administrative assistants)	1.1	1.2
Average number of students	50	56
Average student:teacher ratio	19:1	21:1

In regards to teachers' qualification and training, the survey results indicated that the majority (65%) of teachers in low-fee KG2s had a Bachelor's degree or higher, which is the minimum level of education required to satisfy the qualification standards of the MoE.[13] In fact, 59% of KG2 teachers had at least a Bachelor's degree and 35% obtained a community college or 2-year diploma. Nearly all (98%) of low-fee KG2s have at least some teachers with education-related qualifications. There were only 14 KG2 administrators who reported that none of their KG2 teachers had education-related qualifications. For more details on the number of low-fee KG2 teachers by education level (see Table E1 in Appendix).

When it comes to professional development (PD) activities, according to KG2 administrators, the most frequent types of PD for teachers were reading relevant books or articles (72%), learning through informal peer mentorship (72%), or peer observation as part of a formal school arrangement (71%) (see Figure 3). Due to the ad hoc manner in which these PD activities are pursued or set up, these informal activities cannot be a formal indicator of quality and nor can they substitute for formal pre-primary training. In contrast, MoE courses/workshops, which may be taken as closer to an indicator of quality training, were less frequently reported (34%). Interestingly, CBOs were more likely to report attending other (non-MoE) in-service courses/workshops (77%) compared to their peers from private KG2s (51%) (p<.05). These are likely training provided by NGOs to provide targeted training to support targeted student populations such as Syrian refugees. About 10% of KG2 administrators said that their teachers did not engage in any of these types of PD opportunities, and this rate did not differ significantly

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[13] The actual percentage who are fully qualified is likely to be somewhat lower, since the MoE qualification requirement also specifies that these degrees be in Education (i.e. with "Classroom Teacher' and "Subject Teacher" as the field of study).

by KG2 type (private vs. CBO-based). Yet, in the qualitative interviews, low-fee KG2 administrators expressed a desire to have their teachers participate in more training, particularly training provided by the MoE. Currently, there is no officially required course of professional development for private KG2 teachers but the need and potential demand for such is present. The MoE may consider whether making such training available to low-fee KG2s is possible with the aim to raise the quality of their teaching and learning, particularly in support of their more vulnerable and under-represented student populations.

Figure 3: KG2 teachers' reported professional development activities, by KG2 type
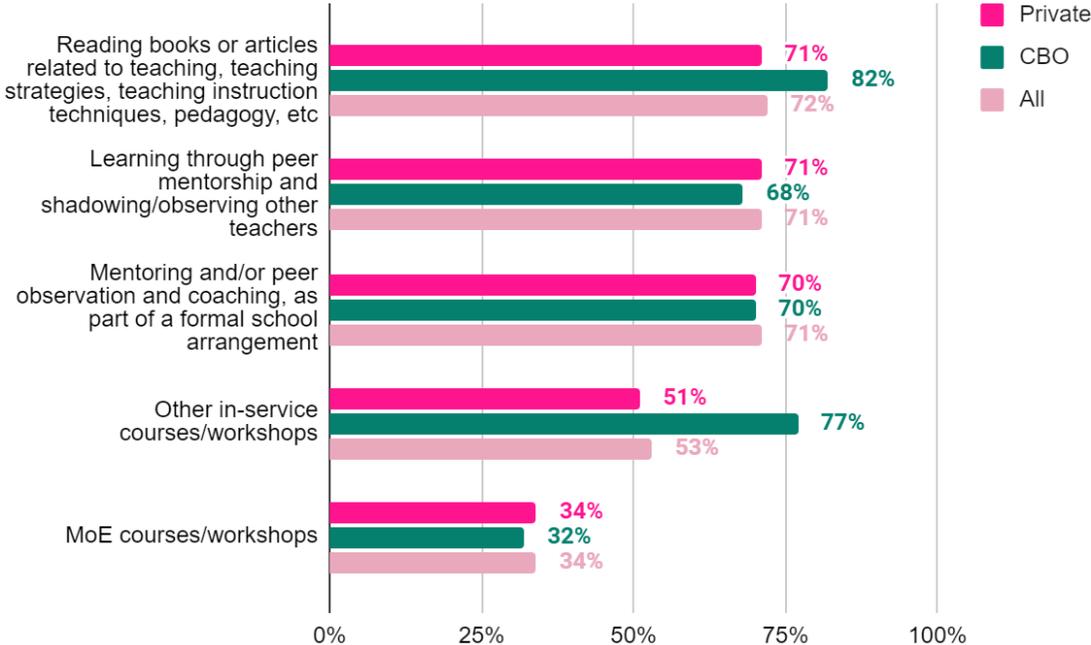
In regard to teacher evaluation, the majority of low-fee KG2s (86%) reported having a formal system for evaluating teachers' performance. In addition, 85% of low-fee KG2s reported having annual professional development plans for their teachers. It is worth exploring the nature of the formal system for evaluating teachers' performance and annual professional development plans principals partake in in future studies, to better understand the aforementioned more clearly. However, the prevalence of teacher evaluations among low-fee KG2s is a positive feature that the MoE can build upon to monitor and tailor support such as the MoE's PD courses if such were made available to teachers.

Curricula

One central indicator of structural quality that is necessary, though not sufficient, for teachers to be able to provide high process quality is instruction, of which the curriculum is seen as a key

part. An evidence-based curriculum that is focused and sequenced can provide greater outcomes for children, particularly if teachers are well trained to implement such plans (Weiland and Yoshikawa, 2013). Thus, the survey asked low-fee KG2 providers about the curriculum, if any, they used since private KG2s can use the MoE curriculum or choose an alternative curriculum with MoE approval. The majority of low-fee KG2s (85%) implement one entire curricular model in their school (Table 5). Only 2% of KG2s did not implement any curricula. The most frequently used curricula were the MoE Framework and Dar Ghad Al Ajyal,[14] at 35% and 23% of KG2s, respectively. For more details on the reported curriculum type (see Figure E1 in Appendix).

Table 5: Reported model/KG curriculum implementation, by KG2 type

	Private	CBO	All
Yes, use one model entirely	85%	91%	85%
Yes, some elements of one model	4%	2%	4%
Yes, several elements of multiple models	9%	5%	8%
No curricular model	2%	2%	2%

The proportion of low-fee KG2s using the MoE Framework varied widely by governorate. Low-fee KG2s in Irbid were the least likely to implement the MoE framework, whereas those in Mafraq were most likely to use the MoE framework. For more details on the reported MoE framework by governorate (see Figure E2 in Appendix).In considering whether or not to partner with low-fee KG2s to achieve universalization, the MoE may want to consider whether the curricula KG2s use needs to be regulated or evaluated and may want to explore why there is such variation among the governorates in terms of private KG2s use of the MoE's framework. It is worth noting that the survey asks about the various curricular models employed in KG2s but does not evaluate the quality, implementation or effectiveness of these models.

To further understand the quality of teaching in low-fee KG2s, the survey included questions about the teaching strategies used (Figure 4). An overreliance on "directive" teaching styles versus child-led exploratory teaching and learning methods can be seen, but also some indications of small group activities, independent work. Most KG2 administrators reported their teachers using the following strategies on a daily basis: reading aloud and discussion (96%),

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[14] Curriculum provided by book publishers Dar Ghad aL Ajyal

allowing individual child practice (82%) and free play (69%). While the results show a diversity of activities employed by low-fee KG2 teachers, the effectiveness and hence quality of their teaching through these methods was not assessed. However, the MoE may want to consider what targeted training may help improve the impact of these methods, how to support teachers to tailor such activities to students' individual needs, and how to enable them to implement more small group learning activities and other creative strategies to engage students in learning. This can help ensure teachers implement more inclusive and effective teaching strategies.

Figure 4: Reported frequency of utilizing the following teaching strategies
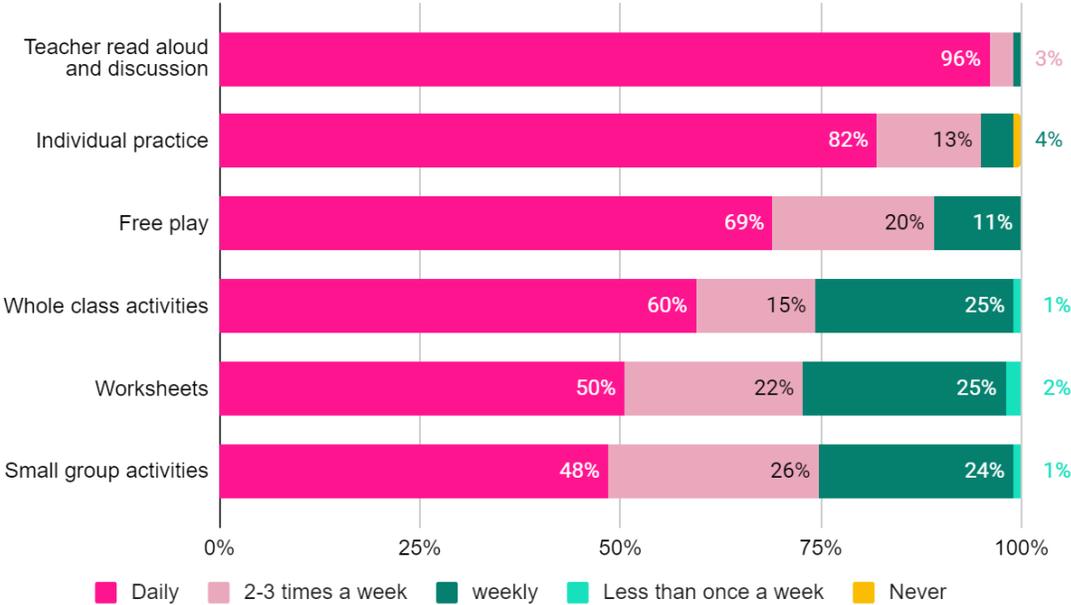
Classroom Resources

The MoE has set standards for the resources that must be available in public KG2s (MoE, 2023b). The standards mandate that age-appropriate, safe and diverse furniture, resources and tools of educational value are provided. While private KG2s have greater flexibility in the resources they provide, the Strategic Plan for Universalizing ECED has set the objective of rolling out a KG2 quality system to private as well as public providers. In light of this, some classroom resources available in low-fee private and CBO-based KG2s were assessed.

Almost all low-fee KG2s reported the availability of child-sized chairs, child-sized tables and chalkboards or whiteboards for instruction. In addition, more than 9 in 10 reported having the necessary writing/drawing utensils, bookshelves, textbooks, and reading story books. Many private KG2s are not meeting various MoE requirements; for example, a large proportion of low-

fee KG2s did not have shoe closets and computers/tablets. It is worth noting that CBOs were substantially less likely to have art supplies and TVs when compared to private KG2s; this was statistically significant with a p-value <0.01. For more details on the availability of resources in classrooms (see Table E2 in Appendix).

Physical Environment and Health

The MoE's regulation standards for both public and private KG2s pay keen attention to the physical environment and safety of the children enrolled as a measure of quality. The survey data indicated that all low-fee KG2s reported having a playing area, whether indoor or outdoor. In addition, almost all low-fee KG2s reported availability of slides and swings. For more details on availability of playground resources (see Table E3 in Appendix). Three-quarters reported availability of see-saws and benches. While only 11% reported having a doctor/nurse on site, more than 70% reported having trained staff for first-aid provision. In addition, 95% reported maintaining vaccination/medical records for the enrolled children. Only 35 low-fee KG2s in total reported not maintaining vaccination records. These are encouraging findings indicating that private KG2s, by and large, provide the required minimum space and care for children while they attend KG2. Thus, the MoE could reliably include them as part of the wider system providing KG2 for all though efforts could be made to ensure all KG2s kept vaccination records for students.

Parental Involvement

Parental and community support and engagement are considered a key element of KG early childhood education (Rossiter, 2016). The Strategic Plan for Universalizing ECED also includes "Awareness and Parental Engagement" as a key pillar (p.20). In the qualitative interviews, low-fee KG2 administrators generally reported they have good relationships with parents. Parents mainly chose KGs based on their reputation in the neighborhood. Most administrators were proud of their institutions and were happy to enjoy a good relationship with parents. Through the survey, low-fee KG2 administrators were asked about the extent to which parents were involved in activities that would support KG quality. About 59% reported medium to high involvement; "to a great extent" or "to some extent". Just under 12% said "not at all". For more details of parent involvement (see figure E3 in Appendix). This response pattern did not vary significantly by KG2 type, which indicates that parents across different demographics groups seem to be actively involved in their children's KG2 experience at roughly comparable rates. This might suggest that, to reach families who do not enroll their children in KG2, a large portion of whom are Syrian, the MoE needs to consider if and how these parents view KG2 and the needs of their child. The MoE could consider how to create demand for KG2 among under-enrolled groups.

Monitoring of Attendance

Since they are managed independently rather than by the MoE Directorate, the ability of private or CBO-based KG2s to collect data and monitor student attendance and learning outcomes is an important indicator of structural quality. Nearly all (99%) of administrators said they tracked children's attendance daily – only 6 across the entire sample said they did not. However, most only tracked attendance on paper; only 16% used specialized attendance software and only 8% used spreadsheets. For more details on methods for tracking daily attendance (see Table E4 in Appendix). Therefore, should the MoE consider working with low-fee private kindergartens, the introduction of digital attendance monitoring compatible with the MoE's own EMIS system would be necessary.

Inclusivity

The inclusivity of low-fee KG2s was a major focus of the study due to the fact that vulnerable students, including those with disabilities, refugee children and children of other nationalities are least able to access KG2. Thus, this section delves into the answers to the second research question: How inclusive are these private sector providers of KG2 in terms of making their services available to disadvantaged and vulnerable children, including refugees and those with disabilities?

The data revealed a number of challenges in the aspect of the sector, particularly among private KG2s. Low-fee private KG2s in Jordan report enrollment patterns which are equitable with respect to gender (about 48% female, 52% male). However, most private KG2s are not reporting enrollment of non-Jordanians, refugees, or students with disabilities and chronic health conditions at a level which is proportional to their respective populations in Jordan. The picture is quite different for KG2s operated by CBOs. These KG2s tend to be inclusive not only with respect to gender, but also with respect to nationality, refugee status, and students with disabilities. The average CBO-operated KG2 reported that 9% of their students were Syrian, and 3% were other non-Jordanian nationalities. They also reported that 10% of their students were refugees of varying nationalities (compared to just 1% for private KG2s). However, it must be highlighted that KG2s consistently taught students of both genders and, when present, various nationalities. Low-fee KG2 providers do not separate students by gender or segregate different nationalities into two different shifts unlike in public schools generally. For this reason, low-fee KG2s provide a somewhat higher level of inclusivity compared to public schools that segregate students by nationality and by gender. Still, a closer look at low-fee KG2s inclusivity of children with disabilities, with varying nationalities, and different gender provide a more nuanced understanding of the issues in regard to making low-fee KG2s accessible to vulnerable groups.

Children with Disabilities and Additional Needs

Access to early childhood education can mitigate the challenges faced by children with disabilities, yet access is often lower for those children most in need (Global Education Monitoring Report, 2020). The Jordan 10-Year Strategy for Inclusive Education (2017) devotes its seventh component to the preschool stage, highlighting the importance of early intervention and of establishing inclusive learning environments in nurseries and KGs to allow children with disabilities to reach their full potential (MoE, 2022d, pp 31).

To assess how low-fee KG2s fared with respect to inclusion of these children, trained enumerators asked administrators a series of questions about the total number of children enrolled, the number with diagnosed disabilities, chronic illnesses and other demographic questions. As reported by KG2 administrators, just 1.6% of the students at the average low-fee KG2 in Jordan have diagnosed disabilities, 2.1% have learning difficulties, and 0.9% have chronic health conditions.[15] Collectively, across all low-fee KG2s reached, the number of children with these identifications was lower than the average rate across KG2s: just 1.1% of the student population at these KG2s were reported to have

> *"The teachers have some pedagogical training but no training to deal with such disabilities. As such, I prefer not to enroll students with severe cases. It would be unfair to the students."*
>
> - low-fee KG2 administrator

diagnosed disabilities, 1.5% were perceived as having learning difficulties, and 0.7% had chronic health conditions. In the qualitative interviews, low-fee KG2 administrators reported that they did not serve many students with disabilities because their teachers do not have the skills to support them.

In contrast, the percentage of students with disabilities reported by CBO-based KG2s was about ten times higher, on average, than the percentage reported at low-fee private KG2s, and this difference was statistically significant (p<.05, Figure 5). CBO-based KG2s also reported higher percentages of students with learning difficulties and chronic health conditions.

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[15] The primary reported diagnosed disabilities consisted of autism spectrum disorder (ASD), Down Syndrome, and motor/movement impairments. The main learning difficulties cited were speech disorders, attention-deficit/hyperactivity disorder (ADHD), and hypomnesia, which is characterized by memory deficits. The main health issues reported were asthma, diabetes, and visual impairment. Note: There will likely be children with special educational needs who have not been identified as having such needs.

Figure 5: Average percentage of children with diagnosed disabilities, learning difficulties, and chronic health conditions reported at low-fee private and CBO-based KG2s

Since the term "disability" is often stigmatized, KG2 providers were also asked a series of more "neutral" questions inspired by the Child Functioning Module developed by the Washington Group on Disability Statistics for ages 5-17.[16] Although this study's adaptation of these questions has not been validated in any prior study and not all types of functional difficulties were included in questionnaire,[17] responses to these questions suggest that substantially higher numbers of children with disabilities or additional learning needs may be served by low-fee KG2s in Jordan than reports of official diagnoses may suggest. Based on these responses (summarized in Table 6), the percentage of students with difficulties in these functional areas in these low-fee KG2s could be somewhere between around five to 7 percent.[18]

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[16] See https://www.washingtongroup-disability.com/question-sets/wg-unicef-child-functioning-module-cfm/ . Instead of asking about an individual child as in the official Washington Group questions, these adapted versions asked KG2 providers to estimate the number of children with various types of difficulties. For example, to assess the prevalence of hearing difficulties, they were asked, "Do any of the children enrolled in your KG2 have difficulty hearing, even if using a hearing aid? How many?"

[17] Due to limited interview time, the questionnaire did not include questions about emotional difficulties like anxiety or depression.

[18] Since the survey was not able to capture how many of the reported functional difficulties were overlapping (i.e. the extent to which students had multiple difficulties or the students reported under each category were mutually exclusive), it is not possible to produce an overall estimate. However, a minimum estimate is provided here by summing the functional difficulty area with the highest reported number for each KG2, and a maximum estimate represents the sum of the percentage for each group.

Table 6: Reported percentage of students enrolled in low-fee KG2s with various functional difficulties

Functional difficulty type	Private	CBO	All
Seeing	0.93%	1.05%	0.94%
Hearing	0.17%	0.39%	0.19%
Walking	0.28%	0.62%	0.31%
Remembering or Concentrating	3.75%	5.44%	3.90%
Communicating	1.44%	1.97%	1.49%

These results highlight the need for further research on the prevalence of disabilities among the KG2 student population in Jordan, as well as on the reasons KG2 providers may be underreporting these rates, whether due to a lack of formal diagnosis, awareness, sociocultural attitudes or stigma around disabilities. The Strategic Plan for Universalizing ECED includes recommendations to develop and disseminate early detection tools for children with disabilities and learning difficulties (pp. 14) which could support research and data collection.

Yet, even if improved identification and reporting revealed that more of these vulnerable children have *access* to low-fee KG2s than formally reported, this does not mean they are meaningfully included in the educational process. In the qualitative interviews, low-fee KG2 administrators said they would appreciate it if their staff could have access to training so they could learn how to support more students with disabilities, learning difficulties, and other needs. Quality control and the promotion of inclusive pedagogical approaches are one of the main challenges in the cooperation with private kindergartens as there are no regular training opportunities for these teachers under the MoE continuous professional development framework, even for fully licensed institutions. This point is further discussed in the "Quality" section of the findings below.

Refugee and Non-Jordanian Children

Another key population noted in the Jordan Declaration on Inclusion and Diversity in Education are refugee children, including both those officially registered with the United Nations Higher Commission for Refugees (UNHCR) and those unregistered. The Jordan KG2 Universalization Strategic Plan also notes the lower rate of access to KG2 among refugees, particularly Syrians, as an area of concern. Refugees and children of non-Jordanian nationality were therefore an important component of the inclusivity analysis.

The population of refugee students[19] served by low-fee private and CBO-based KG2s was concentrated in specific locations. While the mean percentage of refugees enrolled was about 5% (see Figure 6), 53% of CBO-based KG2s and 73% of low-fee private KG2s reported they did not serve any refugees. More than half of all of the refugees served across all KG2s surveyed were clustered in just 23 sites (4% of the 648 KG2s), nearly all of which were relatively large KG2s, serving 60 students or more students, in urban areas in Amman, Mafraq, Irbid and Zarqa. When asked about any challenges in serving refugee students in the qualitative interviews, low-fee KG2 administrators reported that they would have no issue doing so—the only barrier to access they perceived for these students was the ability to pay. (For more on the relationships between fees and refugee enrollment, see the "Fees" section of this report.)

Due to the small size of the CBO sector, more refugee students were collectively served by low-free private KG2s than CBO-based KG2s. However, the average CBO reported serving a much higher percentage of refugee students than the average low-fee private KG2 (p<.001, Figure 6).

Figure 6: Average percentage of Syrian and refugee students reported at low-fee private and CBO-based KG2s

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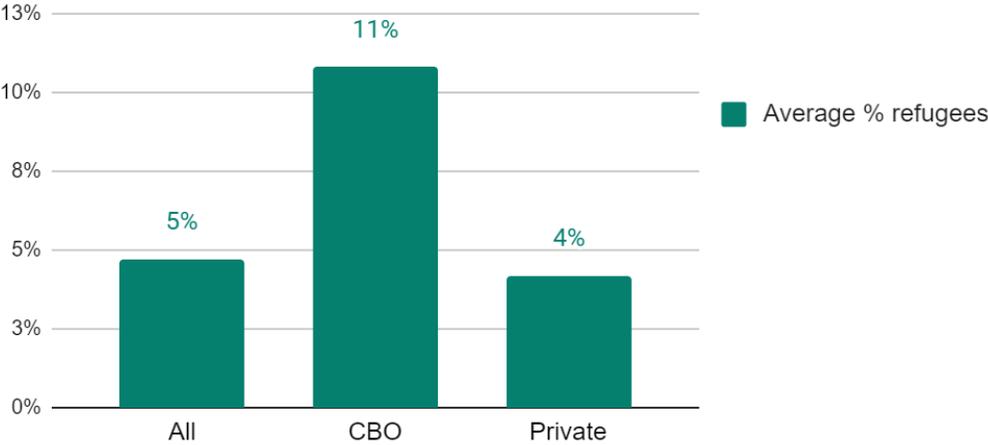
[19] Over the course of the study, it became evident that the definition of who is a "refugee" was not consistent across KG2 administrators. There were a handful of low-fee KG2s who reported high numbers of Syrian students enrolled but answered "none" when asked about the number of refugees. The data collection vendor was requested to conduct follow-up calls with these KG2s, and these calls confirmed that these responses were given because providers did not view anyone who could afford to pay for KG2 as a refugee. In their minds, refugees are those who rely on free government or INGO services. However, the number of KG2s with these large gaps between the number of Syrians and the number of refugees enrolled was small (<3%).

The pattern for inclusion of non-Jordanian students, including those with Palestinian, Sudanese, Yemeni, and other nationalities, was similar to that of refugees. The average CBO-based KG2 served a higher percentage of Syrian nationals than the average low-fee private KG2, although this difference was not statistically significant (Table 7). Looking at the population of non-Jordanian students served across these two sectors, most were attending private KG2s rather than CBOs: 83% of Syrian and 85% of other non-Jordanian students reported across both sectors were attending private KG2s.

Table 7: Average % of Enrolled Students by Nationality

	CBO	Private	Total
Average % Jordanian	87.4%	92.6%	92.1%
Average % Syrian	9.3%	5.3%	5.6%
Average % Other Nationalities	3.3%	2.1%	2.2%

Refugee and non-Jordanian enrollment patterns differed widely by geographic location. The majority of Syrian students enrolled across both sectors were in Irbid (44%) and Amman (30%), although in terms of the average percentage enrolled in each KG2, the highest enrollment rates of Syrians were in Mafraq (see Table 8). The pattern was slightly different for other non-Jordanian nationalities, the majority of whom were in Amman (43%) and Balqa (32%). Most of these other non-Jordanian students (57%) were identified as Palestinian, while the two other most frequently mentioned nationalities were Yemeni and Sudanese students.

Table 8: Average % of Enrolled Students by Nationality and Refugee Status, by Governorate

	Mafraq	Amman	Balqa	Irbid	Karak	Zarqa	Total
Average % Jordanian	86.0%	92.8%	92.5%	91.2%	94.7%	93.5%	92.1%
Average % Syrian	13.6%	4.5%	1.6%	8.5%	4.5%	3.2%	5.6%
Average % Other Nationalities	0.5%	2.8%	5.8%	0.3%	0.7%	3.3%	2.2%
Average % Refugees (including Syrian, Palestinian, others)	18.2%	4.3%	7.0%	2.4%	3.6%	4.2%	4.7%

Gender

The average KG2 population was approximately 48% female, a rate which aligns with the population of the age 0-4 cohort (48%) and is slightly lower than the age 5-9 cohort (50%) in Jordan in 2022 (DoS, 2022). Enrollment rates for girls and boys were roughly equal regardless of KG2 type and governorate. There was a slightly lower percentage of girls enrolled in rural KG2s.

Forty-six percent of students enrolled in rural low-fee KG2s were girls compared to 50% in sub-urban and 48% in urban low-fee KG2s.

Unfortunately, there was insufficient space in the questionnaire to gather more detailed demographics about students enrolled in KG2, and this study is unable to examine the intersection of gender and nationality. However, given that historically, there have been lower rates of KG2 access among Syrian girls compared to boys (MoE, 2018), this issue should be revisited in future research and/or data collection.

Financial Sustainability

Fees charged by low-fee and CBO-based KG2s

On average low-fee KG2 administrators reported charging monthly fees of JOD 38. The average fee charged by CBO-based KG2s was JOD 30 per month, notably lower than at low-fee private KG2s (JOD 39 per month). Overall, 69% percent of CBO-based KG2s charged less than JOD 40 per month, compared to just 44% of the private KG2s surveyed. The proportion charging fewer than JOD 20 per month was even smaller: 17% of CBO-based KG2s and 1% of private low-fee KG2s. However, given the larger size of the low-fee private KG2 sector, there were almost as many private KG2s charging less than JOD 20 per month as CBOs (8 private vs. 9 CBO based KG2s, see Figure 7).

Figure 7: Monthly fees charged by low-fee KG2s, by KG2 type
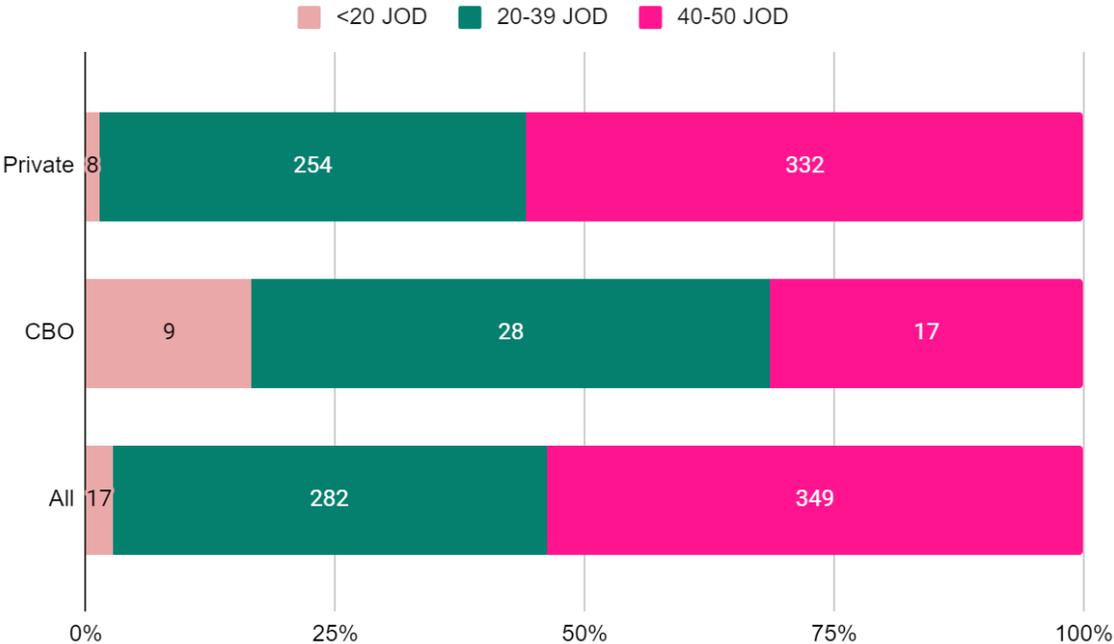
The fees charged by KG2s differed by governorate as well. In Amman, there was only one KG2 surveyed who said they charged less than JOD 20 per month, and 74% charged more than JOD 40. KG2s in Mafraq, Zarqa, and Irbid tended to have the lowest fees (Figure 8).

Figure 8: Monthly fees charged by low-fee KG2s, by governorate

Legend: ■ <20 JOD ■ 20-39 JOD ■ 40-50 JOD

Governorate	<20 JOD	20-39 JOD	40-50 JOD
Amman	1	62	182
Balaqa	1	16	27
Irbid	7	90	78
Karak		6	8
Mafraq	3	27	7
Zarqa	5	81	47
All	17	282	349
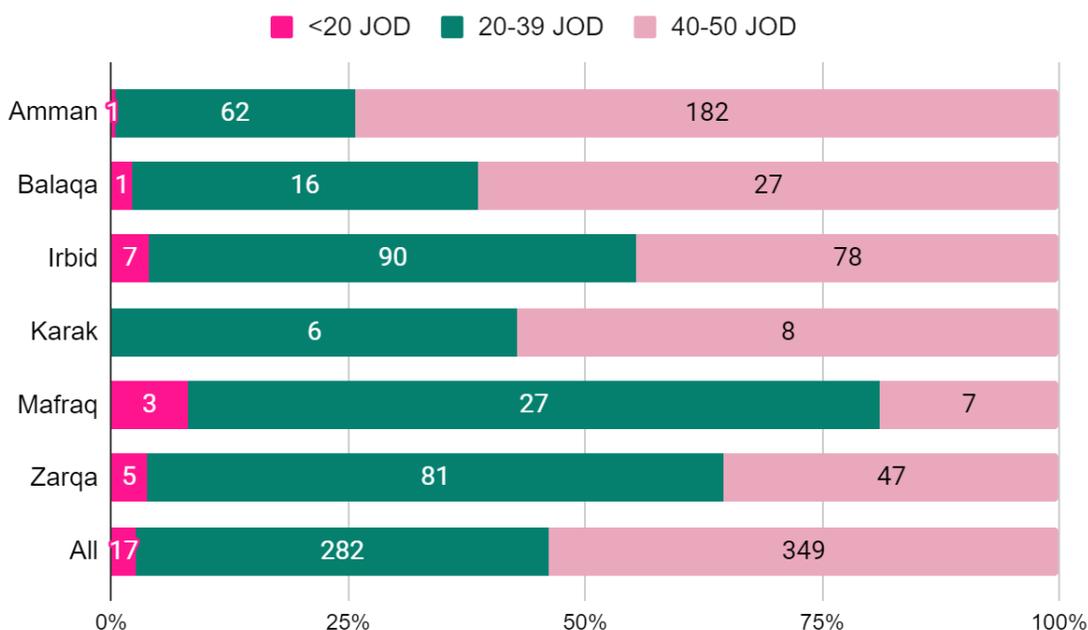
In the qualitative interviews, KG2 administrators viewed fees as something they could not risk changing, as families were already struggling to pay at the current levels. Many administrators cited the challenge of following up with families who did not complete all installments as one of their major challenges (see section Self-reported Challenges). A few administrators also mentioned that the expansion of free public KG2s was forcing them to keep their fees low. This finding is understandable in the broader economic context, where private KG2 tuition – even for "low-fee" KG2s - might constitute around 9% of household income for the average Jordanian household, 15% of monthly income for a Syrian refugee household, and 17% for refugees of other nationalities (Table 9).

"Even if I somewhat increased transportation fees, I cannot increase tuition fees. The parents can barely pay the current amount."
- Private KG2 administrator

Table 9: Estimated percentage of household income required to pay for tuition at the average low-fee KG2

	Average household monthly income (2022)	Estimated % of household income required to afford the average KG2 in this study
Jordanian	JOD 432 (BDex, 2022)	9%
Syrian refugees	JOD 250 (UNHCR, 2022)	15%
Non-Syrian refugees	JOD 225 (UNHCR, 2022)	17%

There was a significant negative correlation between reported monthly fees and the percentage of Syrians enrolled[20] while the negative correlation between monthly fees and the percentage of refugees (which includes Syrians as well as refugees from other nationalities) enrolled was even stronger.[21] The higher the fees, the lower the number of Syrians and refugees enrolled. For example, the average tuition charged by KG2s serving more than 20% refugees was around 30 JOD/month, whereas KG2s serving 10% or fewer refugees charged around 39 JOD/month. For more details on average monthly fees for KG2s serving different proportions of refugees (see Table E5 in Appendix). This was corroborated by the qualitative interviews with KG2 administrators, who generally did not think that private KG2s would resist enrolling Syrians; rather, they believed that any challenges non-Jordanians might face in accessing private KG2 services were due to family income levels.

Should the MoE consider working with the low-fee sector to enroll refugee children, a voucher system may be required as the data suggests that a limited number of families with a refugee background can or are willing to afford KG fees. The costs for such a system for vulnerable families (Jordanian, refugees and other nationalities) are expected to be on average 250 JOD[22] for a KG place in Amman and in other governorates.

By comparison, a place in the two month Summer Readiness Programme implemented annually by the MoE costs between JOD 90 - 100 per child. In addition, the cost of furnishing an empty classroom is JOD 1,700, equating to JOD 70 per child. These costs are amortized over time, making furnishing an empty classroom the most cost-efficient method of expanding access, provided that the necessary infrastructure is available and that factors such as transportation, nationality, and disability are not the primary barriers preventing children from attending school. It is worth noting that the cost of furnishing a classroom covers basic furnishing costs; furniture,

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[20] (Pearson correlation coefficient = -0.137, p<.001)
[21] (Pearson correlation coefficient = -0.247, p<.001)
[22] Source: Planning and Educational Research department at the MoE

carpets, and educational toys. Additional costs for furnishing a KG2 classroom include electronics (JOD 1,500), playground equipment (JOD 1,500), and stationary (JOD 100), bringing the total to JOD 4,800.

Costs [23]

While quantitative survey research may not be the best way to study the types and ratios of costs encountered by private and CBO-based KG2 operators, the qualitative data did reveal some useful information to this end. Just under half of KG2 administrators surveyed (46% of private and 49% of CBO-based KG2s) said they were aware of their monthly costs. Based on these responses, Table 10 shows the average proportion of monthly costs attributed to each major cost area for both private and CBO-based KG2s.[24] The most significant cost factor for both types of KG2s was staff wages with just over half of costs for a typical low-fee private KG2 in Jordan going to wages. Transportation was the second biggest cost factor for both private and CBO-based KG2s, accounting for 15% of monthly costs for the average private KG2s and 11% of costs for the average CBO-based KG2. One interesting finding for CBO-based KG2s is that many did not have to pay rent, ostensibly due to co-location within a broader CBO facility. This may be a contributing factor to CBOs' ability to charge lower fees than private KG2s. However, rent was the third largest cost factor for private KG2s, accounting for 14% of monthly costs on average.

Table 10: Mean and median percentage of monthly costs by cost area and KG2 type

	Private (n=274)		CBO (n=27)	
	Mean % of monthly costs	Median % of monthly costs	Mean % of monthly costs	Median % of monthly costs
Wages	52%	52%	66%	71%
Transportation	15%	12%	11%	3%
Rent	14%	13%	6%	0%
Learning materials	6%	4%	5%	5%
Facilities	6%	4%	4%	2%
Bills	4%	3%	4%	3%

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[23] Administrator reports in this section should be taken with a grain of salt.

[24] The median proportion of monthly costs is also provided, to control for outliers given the high chance that interviewees might not accurately recollect costs during the interview.

Other	5%	0%	4%	0%

Capacity for Expansion

Additional Enrollment Capacity

Survey results suggest that most low-fee KG2s have the physical space to expand, and those lacking the physical capacity have the willingness to expand if it were to become feasible. Approximately 65% of private and 61% of CBO-based low-fee KG2s said they were not at full enrollment capacity, and the number of additional students these KG2s could take on collectively amounted to more than 27,500 (more than 25,000 for private low-fee KG2s and about 2,000 across CBOs), which suggests that low-fee KG2s are currently only serving 54% of their total enrollment capacity (Figure 9).

Figure 9: Current number of students enrolled vs. additional enrollment capacity at low-fee KG2s
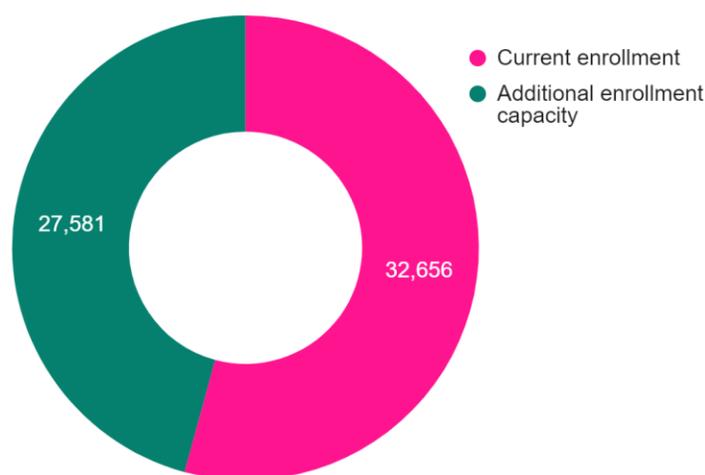
Table 11 shows the distribution of additional enrollment capacity by governorate and KG2 type. The greatest capacity for expanding enrollment in low-fee KG2s exists among private KG2s in Irbid (nearly 10,000 potential seats), Amman (around 8,500 seats) and Zarqa (over 4,500 seats). Across these three governorates alone, this is a total of approximately 23,000 potential additional seats. Assuming the total number of KG2-age children is similar to the 2020-21 figure noted in Strategic Plan for Universalizing ECED – 172,000 – and the current gap between this number and total enrollment for 2022-23 (138,738) (MoE, 2023c) is 33,262, the low-fee KG2 sector (the infrastructure and capacity that currently exists) could theoretically absorb about 83% (27,581/33,262) of the total number of needed KG2 places for universal KG to be achieved. However, more geographically granular data on the location of these children, and their current enrollment patterns with respect to public KG2, is needed to determine whether the capacity among the low-fee KG2 sectors is located within a reasonable

distance of families in need of KG2 access. The Strategic Plan for Universalizing ECED calls for identification of a range of PPP models for consideration (pp. 13), including voucher programs, subsidies to the schools, or alternative models such as charter schools, where KG2s are operated privately, but with public funding and oversight.

Table 11: Distribution of reported current enrollment and additional enrollment capacity for low-fee KG2s, by governorate and KG2 type

Governorate	Private		CBO		All	
	Current enrollment	Additional capacity	Current enrollment	Additional capacity	Current enrollment	Additional capacity
Amman	10,402	8,521	819	580	11,221	9,101
Balqa	2,308	1,065	200	0	2,508	1,065
Irbid	8,187	9,892	641	732	8,828	10,624
Karak	620	158	149	95	769	253
Mafraq	1,259	1,346	392	160	1651	1,506
Zarqa	6,827	4,619	852	413	7,679	5,032
Total	**2,9603**	**25,601**	**3053**	**1,980**	**32,656**	**27,581**

Available Space

With respect to physical space, CBOs tend to be utilizing greater proportions of their classrooms (88% within this sector compared to 80% among private, for-profit KG2s). Classroom utilization rates are lowest in Zarqa (76%) and highest in Karak (89%). Table 12 shows the number of classrooms reported to not be in use, by governorate and KG2 type, showing that many of them are located in Zarqa, as well as Amman and Irbid. This could indicate opportunities for experimenting with one expansion strategy outlined in the Strategic Plan for Universalizing ECED, which is renting non-MoE KG facilities to expand access among vulnerable children (pp. 20).

Table 12: Number of classrooms not in use across low-fee KG2s, by KG2 type and governorate

Governorate	CBO	Private	All
Amman	4	145	149
Balqa	1	36	37
Irbid	25	135	160

Karak	0	5	5
Mafraq	5	17	22
Zarqa	4	139	143
Grand Total	**39**	**477**	**516**

For more details on resources needed for expansion (see Appendix F).

KG2 Providers' Self-Reported Challenges and Strengths

This section aims to answer the third research question in regards to what are the strengths and weaknesses of low-fee and CBO-based KG2s as well as what opportunities and challenges are they facing.

Self-Reported Challenges

As part of the survey, KG2 administrators were asked to share up to five of the main challenges faced by their organizations, without being provided any prompts or categories. They were then asked to indicate their number one most pressing challenge out of all of the challenges mentioned.

More than half of all respondents (55%) selected a financial challenge as their most pressing challenge. Most often this was framed as a problem with low revenues, but some also mentioned high labor costs, rent or transportation costs, or challenges collecting payment installments from families. When considering all challenges mentioned (rather than just the most pressing one), 76% of low-fee KG2s mentioned a financial-related challenge as one of their five main challenges, with somewhat higher rates among private KG2s (77%) compared to CBO-based KG2s (69%). Average enrollment was smaller for KG2s who mentioned financial challenges (mean enrollment = 48 students) compared to KGs who did not (mean enrollment = 58 students), and this difference was statistically significant ($p<.001$). There were also geographical differences, with the highest rates of financial challenges in Mafraq, where 86% of KG2s mentioned a financial issue among their top five challenges, and the lowest rates in Zarqa (68%).

Another major category of challenges was difficulty in reaching their full enrollment capacity. The enrollment issue was linked with financial challenges and was corroborated by other questions on the survey. For example, when asked about enrollment trends post-pandemic the majority of low-fee KG2s reported they experienced a decline in enrollment during the pandemic. However, the most frequent specific enrollment-related challenge was competition with other KG2s, which is a demand issue. While these responses were generally coded by enumerators as general competition with other KG2s, a few respondents

"I have space and rooms to enroll more children but it is not possible because demand is lower. This is due to parents choosing free education in public KGs."
- Low-fee KG2 administrator

specifically highlighted competition with public or unlicensed KG2s. While only about 10% of KG2 administrators stated that competition with other KG2s was their number one challenge, three times as many (30%) mentioned this competition among their top five challenges. This issue did not differ much by KG2 type: the percentage of CBO-based and private KG2 administrators who cited this issue differed by only one percentage point. However, there were substantial differences by governorate, with the highest rate of competition challenges in Balqa (46%) and the lowest in Karak (14%). The incidence of challenges with finances and competition for each governorate is displayed in Figure 10.

Figure 10: Percentage of Low-Fee KG2 Administrators Mentioning Financial Challenges and Competition Among Top 5 Challenges, by Governorate
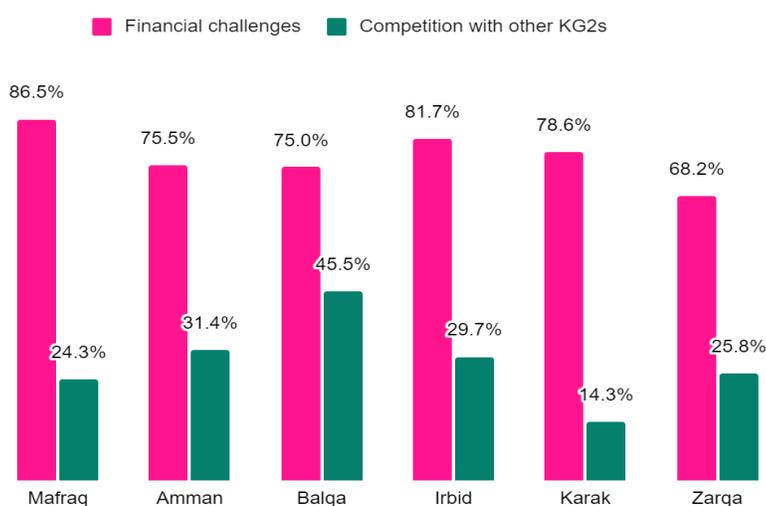
While competition, especially if low-fee and CBO-based KG2s are competing with the growing number of public KG2s, is a good thing in the perspective of the MoE since such competition means access is widening, the fact that competition intersects with financial strains on these KG2s also signals the struggle many of them have to stay in business. Until there is widespread access to quality public KG2 free of charge, then the MoE needs to think carefully of how to ensure private KG2s can sustain themselves and offer quality services. In addition, it is worth keeping in mind that refugees are concentrated in just 23 large KG2s in Amman, Mafraq, Irbid and Zarqa. These are urban areas where the competition is moderate compared to Balqa, which reports the highest competition (45.5%), and Karak which reports the lowest competition (14.3%).

To shed further light on these challenges, KG2 administrators were asked to provide an explanation as to why the issue they reported as their most pressing challenge was so problematic. Their responses further highlight the interconnectedness of many of the challenges such as enrollment, financial security, and engagement with families. Detailed reasons provided for the top challenge categories can be summarized as follows:

- **High costs:** KG2 administrators described a range of cost factors including teacher salaries, government fees, rents, and transportation. Many also mentioned the high cost of living in Jordan, which was affecting the ability of parents to pay for kindergarten.
- **Low revenues:** Interestingly, the explanations from KG2 administrators who selected "low revenues" as the most pressing challenges were very similar to those who selected "high costs", highlighting how the two challenges are two ways of looking at the larger issue of financial stability. They highlighted the high cost of living, which has lowered what families are able to pay for private KG2 and led to late payments, the low priority placed on kindergarten by families, and competition with other KG2s. A few mentioned declining enrollment due to COVID-19.
- **Challenges achieving full enrollment**: Here respondents referenced competition between different kindergartens for families, low ratios of income to expenses, the need for additional physical space to expand enrollment, and the lack of prioritization of kindergarten in society.
- **Challenges engaging families and students**: While respondents mentioned some characteristics of children which they found challenging and also discussed what they viewed as a lack of parental interest in their child's learning, a large proportion of these responses touched on challenges of getting families to pay tuition. This point further reinforces the salience of financial issues as the main category of challenges for low-fee private and CBO-based KG2s.

The qualitative interviews provided more insights on some of these challenges. The main challenge raised in these in-depth, semi-structured conversations was low enrollment, which led to lower revenues and slim profit margins. They described how many parents do not pay the tuition fee by the end of the school year. Once their children need to transfer to grade one, they can do so easily without the need for papers from KG, since the MOE does not require any papers from the KG2 to enroll children in first grade. KG2 administrators felt that this creates an opportunity for some parents to avoid paying their final installments.

"The MoE does not request a clearance from students when they leave the school and there is no law that supports us or that helps us secure our rights."

- private KG2 administrator

Self-Reported Strengths

When asked what they did particularly well, the majority (68%) of low-fee KG2 administrators believed that their ability to provide students with a strong set of foundational skills was their greatest strength, and this response was particularly common among private KG2s. There were a number of other frequent responses to this question that also related to the quality of education as a strength: competency of teaching staff (mentioned by 17% of respondents), use of different teaching strategies (11%), support for socioemotional development (11%), strong curriculum (11%), range of recreational, life skills, and mental activities (9%), positive teacher demeanor/interactions with children (7%), teacher expertise, and multilingual education (4%). Issues related to fees, management, physical environment, and relationships with parents were also mentioned, but much less frequently than quality of provision. For more details on the self-reported strengths (see Table E6 in Appendix).

These findings were corroborated in the qualitative interviews with KG2 administrators, who generally agreed that recruiting qualified, high-skilled teachers was not a major challenge. In these interviews, the majority of schools expressed having and investing in sufficient supplies (for example, books, play dough, building blocks, toys, colors, papers and crafts) to achieve the needed learning outcomes. In the few cases where administrators reported struggling from financial restrictions, most interviewees still described how they found creative ways to provide learning materials, by recycling and using low cost materials.

In the face-to-face surveys with the 59 CBOs who did not offer KG2 services, 56 of them (95%) reported a willingness to offer KG2 services if provided with sufficient resources. Three quarters of these CBOs reported having unused rooms that can be turned into classrooms, and almost all

reported a willingness to serve non-Jordanian students. For more details on the resources these CBOs reported they would need to be able to offer KG2 services (see Figure E4 in Appendix).

These reported strengths highlight the readiness or potential of much of the low-fee and CBO-based KG2s readiness to meet MoE's standards while also highlighting the financial limitations KG2s face in general and in maintenance and transportation specifically. As noted previously, the MoE may consider how supporting transportation costs might enable some KG2s in the high-demand areas to expand their reach and enroll previously underserved children.

Perspectives on Public-Private Partnerships (PPPs)

When asked about private KG2 providers, MoE interviews seemed to operate from an image of medium or high-fee private schools, viewing them as highly profitable and capable of paying high licensing fees, training costs, and contributing their excess resources to support MoE schools. Most MoE staff interviewed strongly believed in the importance of partnerships with the private sector in order to achieve KG2 universalization. They were open to multiple types of PPPs and had many ideas to offer in this regard. For example, one MoE interviewee suggested targeted financial support to specific schools based on the socioeconomic background of students they served, such as schools in rural areas. MoE staff praised the notion of subsidies or vouchers to support low-income families to enroll their children in private KG2s, sharing of space between MoE and provide providers (in either direction, depending on the need or context), and soft loans or grants to support up-front costs of establishing new KG2s. Several MoE interviewees expressed interest in making the licensing process easier for private KG2s, emphasizing the importance of collaboration between all government entities, and volunteering ideas for how to make processes more convenient.

While willing to consider partnerships with low-fee private and CBO-based KG2s, MoE staff did note some areas of caution. First, some mentioned the need for strong regulations on non-public KG2s to ensure quality, as in the "Learning Quality" pillar of the Strategic Plan for Universalizing ECED. Challenges with gathering data from private KG2s for the EMIS were also highlighted in at least one MoE interview. In particular, there was a perception that some private KGs are not reporting accurate enrollment numbers to avoid licensing fees or fines in cases of violations of per-pupil space requirements.

On the other side, the KG2 administrators interviewed viewed the MoE as having high capacity to support them, and they felt they deserved greater leniency when it came to licensing, regulatory requirements, and fees. Regarding PPPs, the low-fee KG2 administrators expressed openness and willingness to cooperate with the MoE in the future. However, they were not clear on the intentions of the MoE with respect to KG2 expansion. Some believed the MOE is aiming

to open more public KGs in order to shift demand and eventually close down private services. Due to this, they were not ready to believe cooperation between the MoE and the private sector to achieve universal KG2 could actually happen.

Both low-fee KG2 providers and the MoE staff who work with them each displayed some tendency to view the other side as having more resources and advantages, and this resulted in unmet expectations and in some cases, mistrust. This came up with two issues in particular:

- **Clearances for Grade 1 enrollment**: Some low-fee KG2 providers felt the MoE should require families to provide documentation of completion from KG2 to enroll in grade 1, as this would give KG2 providers some leverage to collect final tuition installments from families. In the words of one private KG2 administrator: "The MOE does not request a clearance from students when they leave the school and there is no law that supports us or that helps us get our rights." However, the perspective from at least one MoE representative was that the MoE could not intervene in the relationship between parents and private schools. Potential action on this point should be approached with care to avoid excluding children from Grade 1 who attended non-formal or unregistered KG2s, or those who did not have access to KG2.

- **Teacher training:** Low-fee KG2 administrators had positive views of training courses offered by the MoE and were eager to have their teachers participate in such training. In particular, they were keen to obtain training on how to support students with disabilities. However, there was disappointment that private sector KG2s are not always invited to participate, and that the MoE was not provided the training for them free of charge. By contrast, at least one MoE interviewee said they believed the private KG2s should pay for training of MoE teachers and suggested that private sector providers should be offering up their spaces for public sector teacher training.

These examples show how, in some cases, MoE officials and low-fee KG2 providers are operating from quite disparate viewpoints of what PPPs might look like, and each may have misperceptions of the other. This suggests that expanding mutual awareness between the two parties of their respective challenges and responsibilities — especially the financial challenges faced by private providers and the challenges the MoE faces in regulating quality in all sectors as they expand given its own limited resources — could strengthen the foundation for future partnerships.

Synthesis of Strengths and Challenges

Both strengths and challenges were identified for low-fee private and CBO-based KG2s in the key issues explored in this study, summarized in Table 13.

Table 13: Summary of Strengths and Challenges in the Low-Fee KG2 Sector in Jordan

Topic	Strengths	Challenges
Licensing and regulations	Licensing and regulations is not a particularly urgent or pressing challenge for most low-fee KG2s, only 4% consider it their #1 challenge. The MoE has committed to simplifying licensing procedures for all private schools, and this work is underway.	Low-fee KG2s describe the licensing process as time-consuming and difficult. Licensing fees and fines for violations can be very costly for low-fee KG2s, and could discourage their establishment, participation in the licensing process, or accurate reporting of enrollment and other information. Past survey research (DeStefano et al, 2018) indicates that there may be many more students enrolled in KG2 than documented in MoE data systems, suggesting that many providers–likely non-public ones- are either not registering with MoE or underreporting the number of students enrolled.
Quality	Low-fee KG2 providers report few staffing challenges–65% of their teachers have a Bachelor's degree or higher. 86% report having a formal system for teacher evaluation. Low-fee KG2 administrators are eager to have their teachers receive even more training, particularly on how to support students with disabilities. All low-fee KG2s reported having a play area, whether indoor or outdoor, and about 90% or more had basic resources such as child-sized furniture, stationary, textbooks, storybooks, art supplies, and toys. The majority of low-fee KG2s use a	An overreliance on "directive" teaching styles versus child-led exploratory teaching and learning methods can be seen. Low-fee private providers feel MoE should offer training for free, whereas MoE staff may see providers as responsible for paying. Support for teachers is difficult to assess through surveys of their supervisors – teacher surveys or observational work is needed to verify this. Significant proportions (about 15% or more) of low-fee KG2s do not have manipulables, activity books, and carpets/rugs. Most low-fee KG2s track attendance on paper only, and only 29% have computers/tablets available to support learning.

Topic	Strengths	Challenges
	wide range of teaching strategies (teacher read-aloud, independent work, free play, worksheets, and small group activities) at least once a week. Nearly all (95%) of low-fee KG2s maintain vaccination/medical records for children, and 99% monitor attendance daily.	
Inclusivity	CBO-based KG2s are quite inclusive with respect to refugees and students with disabilities. Low-fee private KG2s report willingness to serve refugees. They are also willing to serve students with disabilities, provided they receive support and training to do so. Children are taught together, regardless of their nationality. Refugee and Jordanian children are not segregated into separate shifts by gender or nationality, allowing for a more inclusive and diverse learning environment.	Most private KG2s are not reporting enrollment of non-Jordanians, refugees, or students with disabilities and chronic health conditions at a level which is proportional to their respective populations in Jordan. The most vulnerable families (low-income, refugees, etc.) have the least ability to pay for KG2. Low-fee KG2 administrators do not feel they have the resources/training they need to serve students with disabilities and special needs, and may believe that students with the greatest needs should attend institutions specialized for children with disabilities. Evaluating inclusivity is challenging without recent, granular (i.e. district or sub-district level) data on where refugee children and children with disabilities live. Infrastructure is largely inaccessible and teaching staff is not trained on inclusive education. It may be difficult to provide an inclusive learning environment for private KGs in the short-term without considerable investments.
Financial sustainability	Both low-fee KG2 administrators and MoE staff shared the view that the KG2 sector was likely to expand post-pandemic.	Given costs, most private KG2s cannot afford to keep tuition at the level that would truly be considered "low-fee" to middle or lower-class families in Jordan. There were

Topic	Strengths	Challenges
	Low-fee private KG2s have demonstrated capacity to survive economic challenges: the average low-fee KG2 has been in operation for 17.5 years.	only 17 low-fee KG2s in the quantitative sample who charged less than 20 JOD/month, and only 44% of private KG2s charged less than JOD 40 per month. This is contributing to lower enrollment of refugees in private KG2s than compared to Jordanian children. Low-fee KG2 providers said expansion of public KG2s was leading to declining enrollment
Capacity for expansion	The majority of low-fee KG2s report they are not at full capacity, with an estimated 27,500 seats available among KG2s surveyed (potentially more among those not in the study). The average low-fee KG2 uses only 80% of its available classrooms, and over 500 unused classrooms were reported across the quantitative survey.	Families' ability to pay for KG2 is limited, particularly among vulnerable communities. Seats at low-fee KG2s may not be available in the locations where unmet need exists. Parents may not be aware of available and affordable KG seats in their areas. Parents may not think that KG2 is important to prepare their child for grade 1.
Potential for partnership	MoE officials are open to a wide range of partnership models, especially those that support enrollment of low-income families, and have ideas to bring to the table. MoE officials are willing to continue working to make licensure processes and other regulatory requirements more convenient for private providers. Low-fee KG2 administrators are willing to partner with MoE and particularly eager to receive support with teacher training. The present study collected a wealth of detailed information about low-fee KG2 providers, which can be used to identify areas of partnership.	Some low-fee KG2 administrators may not believe that partnership with the MoE is feasible, or fear that MoE's long-term goal is to expand public KG2s and shut down private sector providers. Some MoE officials hold a perspective of private sector providers as all being highly profitable businesses who should be giving support to the MoE rather than the reverse.

Topic	Strengths	Challenges

Recommendations

The following recommendations have been formulated and discussed through a workshop involving relevant stakeholders, conducted on the 21st of November 2023. These suggestions have been prioritized by the stakeholders during the discussions.

Licensing and regulations

- Create a one-stop shop for registration, follow up, and supervision on licensing linked to the different MoE field directorates in all governorates[25].
- Create a manual for low-fee KG2s on licensing and regulations; rationale and steps to take.
- Follow up on data entry and accuracy of data in EMIS by the school management and the MoE.
- Explore ways to encourage unregistered "unofficial" KG2 providers to become registered and licensed.
- Provide capacity-building and loans to support low-fee KG2s to help them meet accreditation standards, in collaboration with donors and partners.
- Design and implement a public awareness campaign to make families aware of how KG2 accreditation serves as a signal of quality.

Quality

- The MoE could lead the enhancement of professional development pathways for low-fee KG2 teachers by providing training to improve their skills, knowledge, and pedagogical effectiveness. Meanwhile, the private sector and donors could be responsible for covering the associated training costs.
- Conduct a review (potentially by the National Center For Curriculum Development) of the curricular models in use by private KG2s to ensure they are well-aligned with national curricular standards.
- To better assess the quality of low-fee KG2 services, include private and CBO-based KG2 teachers in future teacher surveys or studies of teaching and learning quality in Jordan.

Inclusivity:
- Improve existing data on the number and location of disadvantaged and vulnerable KG2-age children to better identify areas where these students are (most) under-served and

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[25] The MoSD has a website that helps with licensing procedures.

collect comprehensive data, if unavailable. Develop a context-specific plan for expanding enrollment of these students in each of these target areas.

- Provide capacity building / training to low-fee providers on how to support students with disabilities or additional learning needs.[26]
- Develop and pilot financing mechanisms that aim to promote inclusivity in low-fee KG2s.[27] E.g. targeted vouchers, grants to providers linked to inclusion of specific groups.
- Pilot other approaches that address non-financial barriers to KG2 inclusion (e.g awareness sessions on inclusivity to parents).

Financial Sustainability

- Pilot a subsidized loan and grants program to support KG2 establishment and/or expansion, as recommended in the KG2 Universalization Strategic Plan. This could potentially be supported by local banks through exemptions from bank interest.
- Launch private-sector sponsorship programs as part of Corporate Social Responsibility (CSR) schemes to provide financial assistance to low-fee KG2s for tax purposes.
- MoE could provide training on financial sustainability to low-fee KG2 providers.[28]
- Explore PPP options; this could increase revenue stream to low-fee and non-profit KG sector; e.g. expanding access to available KG seats via vouchers to individuals or grants to providers.

Expanding KG2 capacity in Jordan:

- Understand and address non-financial barriers to lack of participation in KG2. For example, determine if there is a need for (and if there is a need, design) information campaigns to educate parents about the value of KG education and / or information about the availability of KGs in their communities. [29]
- Understand the overlap between available seats in existing KG2s and unmet demand. For example, this might be done by:
  a. Linking data on the location of KG2-age children to data on public sector enrollment (from EMIS) and private sector enrollment (from this study or from future EMIS data collection). [30]
  b. Using EMIS: Adding a question about KG2 enrollment to the registration form for Grade 1.

Potential for Private-Public Partnerships:

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[26] There are existing trainings (e.g Humanity and Inclusion(HI)).

[27] HI offers financial support for school fees and transportation.

[28] There are already financial sustainability trainings offered by other entities like GIZ and Plan International.

[29] The Ministry of Education (MoE) and the National Council for Family Affairs (NCFA) have plans to launch an awareness program.

[30] There are existing heat maps for KGs.

- Design, and conduct a cost analysis for possible PPP models, e.g.: vouchers for individuals; grant subsidies for private providers/vouchers for institutions (upfront / results-based / blended);[31] build-operate-transfer (BOT) approaches; management-based contracts (publicly financed, privately run). Pilot and evaluate model(s).
- Identify ways for the MoE to engage with low-fee KG2s around policy issues more frequently; for example, expand existing working groups to include representation from both public and private sector (the National ECD group to include a representation of the private sector).

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[31]The World Bank is working on a project involving vouchers and subsidies in collaboration with the Ministry of Education (MoE). The pilot is expected to roll out in 2024.

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Appendices

Appendix A

Defining Low-Fee Private KG2 in Jordan

There were many factors considered when researchers in this study set out to determine what constituted a "low-fee" private KG2 in the context of Jordan. These factors included considering the minimum wage as well as average family income for both Jordanian nationals and those of other nationalities, including Syrians. A 2017 survey (DeStefano et al., 2018) found that 3% of families paid JOD 1-10 per month, 45% paid JOD 11-40 per month, and 17% paid more than JOD 40 per month. The same survey found that urban families paid more than rural families for private KG2, on average, and that Syrian families were the least able to afford fees above JOD 30 per month. In addition, during discussions held in December 2022, MoE officials in the Private Education department indicated that they considered the threshold for "low-fee" KG2 to be JOD 50 or less.

To ensure that a sufficient number of KG2 schools met this criterion and to verify the feasibility of achieving the targeted sample size, the research team requested that the data collection agency conduct computer-assisted telephonic interviews for the entire known population of 1,687 private and CBO-based KG2s. The findings from the telephonic interviews revealed a sufficient number of KG2s (62% of reached private and CBO-based KG2s) falling within this category to achieve the study objectives. As a result, the research team decided to maintain the definition of "low-fee" KG2 schools as those charging JOD 50 per month or less for the purpose of this study. However, given average household incomes in Jordan (estimated at 432 JOD/month for Jordanians and JOD 250 for Syrian refugees), it is recognized that "low-fee" is a relative term.

Appendix B

Sampling Frame

In order to achieve the objectives of the survey, the following two main population categories were targeted through quantitative surveys:

> Administrators (owners, principals, or supervisors)[32] of private sector KG2s

> Administrators of CBO-based KG2s

A small sample of administrators of CBO-based Early Childhood programs which *do not* provide KG2 services was also targeted, to obtain supplementary information about the constraints on CBO-based KG2 provision.

> The sampling frame was geographically constrained to six governorates: Amman, Balqa, Irbid, Mafraq, Zarqa, and Karak. Five of the six governorates (all but Karak) were chosen because they are the governorates known to have the highest numbers of private kindergartens and because they have high proportions of Syrian refugees (given that inclusion of refugees was a key research area). Karak was included to provide some information about the nature of low-fee KG2s in the South of Jordan.

The qualitative component of the study consisted of key informant interviews with the following target groups:

> MoE stakeholders: six interviews with representatives from the Early Childhood Development department, the Educational Training Department, the Planning department, the Private education department, and Legal and regulatory affairs Affairs, the Queen Rania Center for Education Technology and Information (QRC).

> Administrators of private sector KG2s and CBO: 12 interviews.

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[32] The term "administrator" is used throughout this report to refer to any of these KG2 leadership roles.

Appendix C

More on the Quantitative Survey

Piloting the Survey: A pilot study was conducted to assess the questionnaire's effectiveness across target groups, involving 20 private schools and 2 CBOs distributed in four governorates (Amman, Irbid, Zarqa and Balqa). The data collection vendor provided input on questionnaire optimization. Enumerators underwent two training phases: one for telephonic data collection on basic KG2 information and another full-day session for face-to-face interviews. The latter included a manual developed by the vendor, reviewed by QRF, covering study background, enumerator roles, interview preparation, question clarification, sampling methods, soft skills, tablet use, and confidentiality. Training concluded upon confirming enumerator readiness for fieldwork.

Survey Implementation & Sample Verification: Telephonic interviews were conducted in March 2023, and phone calls were made to all private KG2s in the MoE database and all CBOs in the Plan International and GIZ lists. Significant efforts were undertaken to achieve the highest response rate possible. Despite encountering some challenges in establishing contact with a significant portion of schools and CBOs over the phone, dedicated efforts were made to reach them at their addresses to conduct face-to-face interviews with these entities. Each potential KG2 was contacted at least three times by phone, and those unreachable by phone were visited in person. The data collection vendor followed up on all requests for callbacks at a later time and requests to see official MoE letters explaining the research. Efforts were also undertaken to obtain updated contact information from the MoE's EMIS team at the QRC for private KG2 records with incorrect numbers, disconnected lines and wrong numbers. Following CATI, the research plan had called for a review of the telephonic interview findings to determine the scope of the second phase of quantitative face-to-face interviews. Since only a minority of the potential KG2s on the original MoE and Plan/GIZ lists were found to be within scope (i.e. continuing to provide KG2 services and qualifying as low-fee), it was determined that the entire list of KG2s found to be in-scope in the telephonic interviews phase would be contacted in the face-to-face interviews phase of data collection.

Table C1: Number of private sector KG2s registered with the MoE, by governorate[33]

	Number of private KG2 providers	Share of private KG2 providers
Amman	795	51%
Balqa	106	7%
Irbid	328	21%
Mafraq	50	3%
Zarqa	228	15%
Karak	47	3%
Total	1,554	100%

Table C2: Number of CBOs Providing ECD Services (per Plan International and GIZ records)[34]

	Number of CBOs	Share of CBOs
Amman	27	20%
Balqa	3	2%
Irbid	39	29%
Mafraq	25	19%
Zarqa	34	26%
Karak	5	4%
Total	133	100%

Source: Plan International Jordan

Additional KG2s identified during data collection: Face-to-face surveys were conducted from May to June 2023. All private and KG2s that were not disqualified in the telephonic interviews stage (i.e. did not refuse to participate in the study or indicate they did not provide KG2 or

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[33] List was reviewed by the data collection vendor to include 1,554 private KG2 providers. Details in "Prevalence and Distribution of Low-Fee KG2s" section.

[34] This list includes CBOs working in ECD, not specific to KG2 provision only.

charged fees above 50 JOD per month) were visited in person at least once. In addition to tracking respondents' answers to interview questions in their tablets, enumerators also kept detailed information about the result of each attempt to visit each KG2, including photographs of buildings of KG2s which appeared to be closed. When it appeared that KG2s had relocated, enumerators interviewed local residents to obtain updated addresses or contact information for the KG2s.

Prevalence and Distribution of Low-Fee KG2s

Out of all 1,773 potential private KG2s and 158 potential CBO-based KG2s,[35] about half (51%) were found to be out-of-scope of the study. For private KG2s, the main reasons they were found to be out of scope included charging more than JOD 50 per month (48%), having closed (3%), and not offering KG2 (0.1%). There were no CBOs on the PLAN International list found to be charging more than 50 JODs/month or having closed, but there were 76 CBOs (48%) which did not offer KG2 (which was unsurprising given that the list encompassed CBOs providing any level of early childhood services, rather than KG2 specifically). In addition to the out-of-scope KG2s, there were about 15% whose status as a low-fee KG2 remains unknown. For private KG2s, there were a number who declined the request for the interview (9% of those contacted) and 6% who were unreachable, even after repeated attempts to contact them by phone. While no CBOs refused the interview request, about 9% of them could not be reached. (Table 5)

Table C3: Status of potential low-fee KG2s contacted

	# Private	% Private	# CBO	% CBO	# Private + CBO	% Private + CBO
Attempted to reach	1,773	100%	158	100%	1,931	100%
Confirmed in-scope	93	33.4%	68	43.0%	661	34.2%
Total confirmed out-of-scope	910	51.3%	76	48.1%	986	51.1%
Charged more than 50 JODs	856	48.3%	0	0.0%	856	44.3%
Closed	52	2.9%	0	48.1%	52	2.7%
Not offering KG2	2	0.1%	76	48.1%	78	4.0%
Total unconfirmed	271	15.3%	14	8.9%	285	14.8%
Unreachable	109	6.1%	14	8.9%	123	6.4%
Refused	1,652	9.1%	0	0.0%	162	8.4%

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[35] The CBO list included all entities offering early childhood services, and was not specific to the KG2 level.

Data Analysis

Quantitative data analysis was conducted by QRF, and included three main components:

1) **Data validation and preparation for analysis:** The datasets provided by the data collection vendor were reviewed to ensure they were complete and to identify obvious errors or gaps, which the vendor then reviewed and followed up with callbacks to some KG2s where necessary. Some questions and quality issues were also identified in later stages of the analysis and led to additional review and callbacks by the data collection vendor. Much of the data required transformation to support analysis. For example, reported counts of various types of students enrolled in each KG2 (e.g. by gender, nationality, or disability status) were converted into percentages of enrollment for each KG2, to facilitate assessment of average rates across the sector.

2) **Exploratory data analysis and descriptive statistics:** The distribution and central tendency (i.e. mean or median) of responses to each survey question were reviewed, using data visualizations, frequency tables and descriptive statistics. Descriptive statistics for each variable were also disaggregated by low-fee KG2 type (private vs. CBO-based) and governorate. Where relevant, results were also disaggregated by KG2 enrollment level (i.e. size), fees charged, and area type (whether urban, rural or suburban).

3) **Inferential statistics:** Inferential statistics including t-tests, chi-square goodness of fit tests, and analysis of variance (ANOVA) were used to confirm the statistical significance of key findings. These tests were conducted with a 95% confidence interval and p-values are reported where relevant throughout this report.

Appendix E

Additional charts and graphs

Table E1: Reported number of low-fee KG2 teachers, by education level

	Community college/ 2-year diploma	Bachelor's Degree	Higher diploma, Master's Degree	Doctoral degree (PhD, M.D, etc...)	% with Bachelor's degree or higher
CBO	80	110	6	2	60%
Private	663	1,133	100	7	65%
Total	743	1,243	106	9	65%

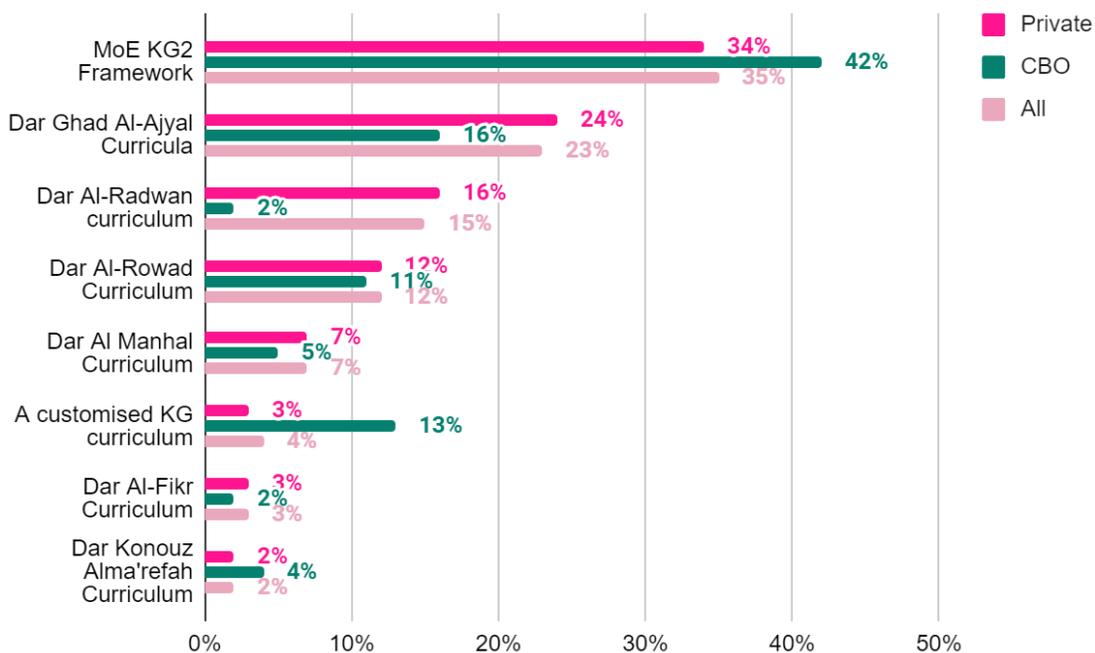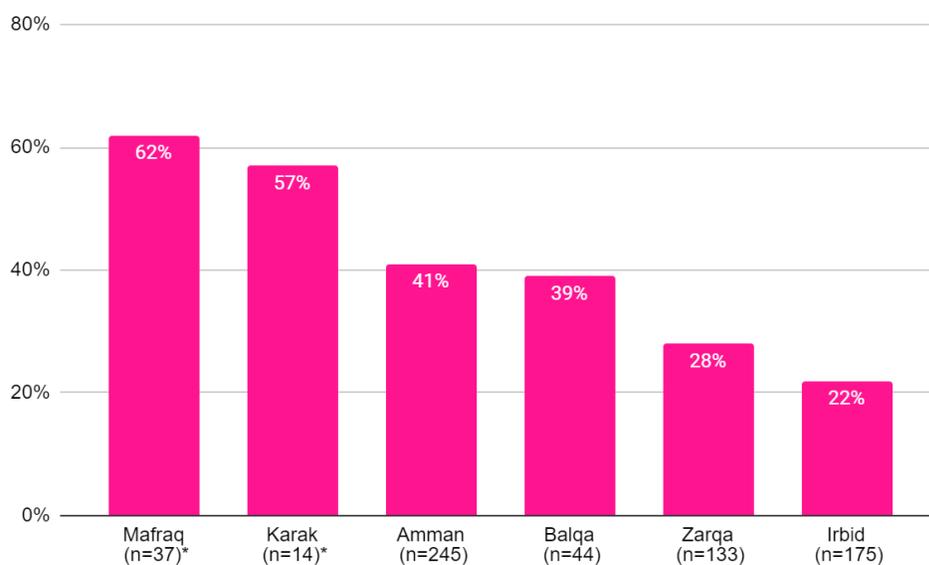**Figure E1: Reported model/KG curriculum type, by KG2 type**

Figure E2: Reported MoE KG2 framework implementation, by governorate

*Small sample size

Table E2: Reported availability of the following resources in classrooms, by KG2 type

	Overall	Private KG2	CBOs
Child-sized chairs *	99%	99%	98%
Child-sized tables *	99%	99%	96%
Chalkboard or white board for instruction	99%	99%	95%
Writing/drawing utensils (pencils, pens, markers, crayons, watercolors, paintbrushes) [36]	97%	97%	95%
Bookshelves *	94%	95%	91%
KG textbooks	94%	94%	86%
Reading books & storybooks *	90%	90%	86%
Art supplies	89%	90%	79%
Synthetic or Natural Toys	89%	89%	84%
Water cooler *	84%	84%	82%

[36] The MoE standards for Classroom Resources for KG2 includes "stationary."

Manipulables (seeds, bottle caps, dice, blocks, balls, beads, rocks, straws, playdough, materials used for counting, sorting)	78%	79%	70%
Activity books	78%	78%	73%
Carpet/rug (at least two 12m² rugs) *	73%	73%	70%
Television	55%	56%	43%
Jacket/coat rack*	47%	47%	46%
Puppetry*	41%	41%	46%
Computers*/Tablets	29%	29%	27%
Shoe closet *	25%	24%	34%

*Indicates classroom resources included in the MoE regulations for public KG2 licensing

Table E3: Reported availability of playground resources

	Overall	**Private**	**CBOs**
Slide	97%	98%	95%
Swing	94%	95%	89%
See-saw	74%	74%	76%
Benches	74%	75%	69%
Sandbox	63%	63%	65%

Figure E3: Distribution of low-fee KG2 parent involvement in services/activities aimed at improving the quality of KG (e.g. moral support, physical support, logistical support, etc.)
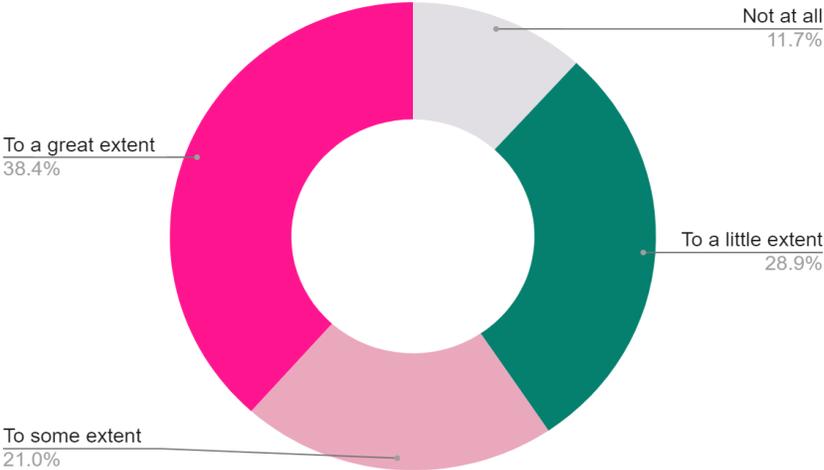

Not at all
11.7%

To a great extent
38.4%

To a little extent
28.9%

To some extent
21.0%

Table E4: Methods for Tracking Daily Attendance, by KG2 Type

	Private	CBO	All
Paper	93.8%	92.7%	93.7%
Specialized software	16.0%	10.9%	15.6%
Digital spreadsheets (e.g. Excel)	7.3%	14.5%	7.9%
Other	1.9%	0.0%	1.7%

Table E5: Average monthly fees for KG2s serving different proportions of refugees

Reported Percentage of Refugees Enrolled	Number of Low-Fee KG2s	Percentage of Low-Fee KG2s	Average Monthly Fees (JOD)
0%	461	71%	39.4
1-5%	51	8%	38.5
6-10%	51	8%	38.6
11-20%	41	6%	34.2
more than 20%	44	7%	30.1
Total	648	100.00%	38.3

Figure E4: Percentage of CBOs not offering KG2 needing various resources to be able to offer KG2

Furniture — 80%
Educational resources (books, platforms,...) — 71%
Stationery — 68%
Qualified teachers — 59%
Additional classrooms — 54%
Study plan and curriculum — 50%
Outdoor games — 46%
Building abilities/training of existing staff — 38%
Teaching aids (games,.....) — 4%
Transportation — 4%
Maintenance — 4%
Financial support — 2%
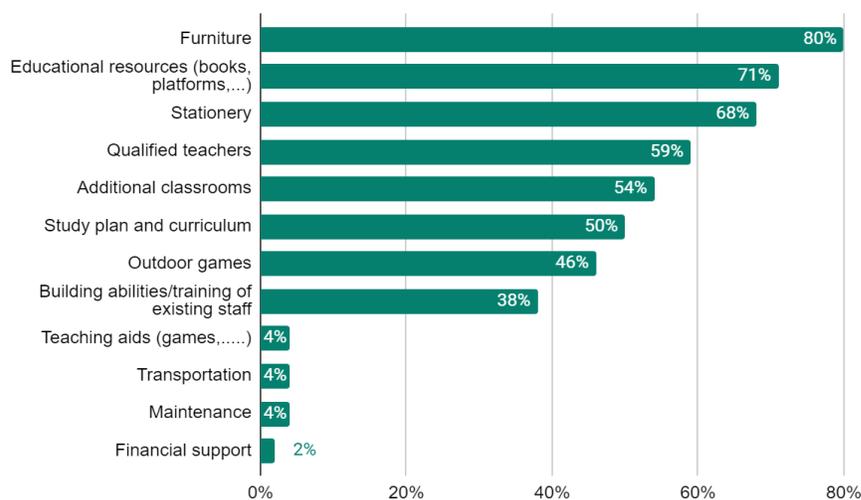
Table E6: Most Frequent Self-Reported Strengths of KG2s, by KG2 Type

	Private	CBOs	All
Strong teaching of foundational skills	70.7%	41.8%	68.2%
Competency of teaching staff	15.7%	36.4%	17.4%
Use of an array of modern teaching strategies (e.g. play)	10.6%	14.5%	11.0%
Support for students' socioemotional development	11.0%	9.1%	10.8%
Strong curriculum	11.1%	3.6%	10.5%
Attention to the Prophet's Sunnah and Memorization of Quran	9.1%	12.7%	9.4%
Range of recreational, life skills, and mental activities	8.8%	5.5%	8.5%
Positive teacher demeanor/interactions with children	7.4%	1.8%	6.9%
Teacher expertise	5.6%	9.1%	5.9%
Multilingual education	4.7%	0.0%	4.3%
Affordable fees and convenient payment plans	3.4%	7.3%	3.7%
Good management/efficiency	2.5%	3.6%	2.6%
Safe environment for children	2.4%	1.8%	2.3%
Strong reputation in the area	2.2%	1.8%	2.2%
Communication with parents	2.0%	1.8%	2.0%

Resources needed for expansion

Of those who were at full capacity, 72% of private KG2s and 81% of CBOs said they would be willing to expand enrollment if it were feasible. The survey results indicated that, of those KG2s willing to expand, the most needed resource to do so was additional space followed by additional staff and additional learning materials (see Table 23).

Table F1: Percentage of low-fee KG2s needing various resources to expand enrollment

	Private	CBO	All
Additional staff	38%	42%	38%
Additional space	50%	42%	49%
Additional learning materials	26%	42%	27%
Update to school program	19%	27%	19%
No resources needed	6%	0%	5%