

**THE EFFECTS OF FREE EDUCATION
POLICY IN BASIC SCHOOLS OF NDOLA
AND MASAITI DISTRICTS OF THE
COPPERBELT PROVINCE, ZAMBIA**

BY

RONALD SIAME KAULULE

2006



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RONALD SIAME KAULULE

**A dissertation submitted to the University of Zambia in partial fulfillment of
the requirements for the award of the degree of the Master of Education in
Educational Administration**

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AUTHOR'S DECLARATION

I, Ronald Siame Kaulule, do hereby solemnly declare that this dissertation represents my own work and that it had never been previously submitted for a degree at this or any other university.

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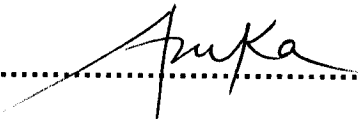
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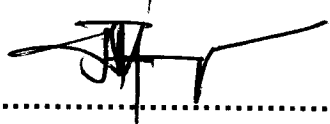
To my late father, Sefiti Siame Kaulule, my mother, Rhoda Nayame Kaülule, my wife, Beatrice Miti Kaulule, my children; Ilaki, Ronald, Abigail and Kela whose support and encouragement in my education and work will forever inspire me.

APPROVAL

This dissertation by Ronald Siame Kaulule is approved as a partial fulfillment of the requirements for the award of the Master of Education (Educational Administration) degree of the University of Zambia

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ACRONYMS

1.	AIDS	Acquired Immuno-Deficiency Syndrome
2.	BSA.CO.	British South African Company
3.	DESO	District Education Standards Officer
4.	DEBS	District Education Board Secretary
5.	DFID	Department of Foreign and International Development
6.	ESO	Education Standards Officer
7.	EFA	Education For All
8.	FBEP	Free Basic Education Policy
9.	FPE	Free Primary Education
10.	FEP	Free Education Policy
11.	FCUBE	Free Compulsory Universal Basic Education
12.	GRZ	Government of the Republic of Zambia
13.	HIV	Human Immuno-Deficiency Virus
14.	IRIN	Integrated Regional Information Network
15.	MOE	Ministry of Education
16.	ME	Ministry of Education
17.	MMD	Movement for Multiparty Democracy
18.	NGO	Non-Governmental Organisations
19.	UN	United Nations
20.	UNESCO	United Nations Educational, Scientific and Cultural Organisation
21.	UNZA	University of Zambia
22.	PEO	Provincial Education Officer
23.	PTA	Parents Teachers Association

ABSTRACT

The purpose of this study was to investigate the effects of the Free Education Policy in Ndola and Masaiti Districts. The survey design was used, coupled with quantitative and qualitative methods. A sample total of 244 Respondents was selected from six schools in Masaiti and six schools in Ndola.

Data was collected using questionnaires, Semi structured interviews and Focus Group Discussion. Further, quantitative data collected was analysed using Statistical Package for Social Sciences (SPSS) while data from interviews and Focus Group Discussions was analysed qualitatively by coding and grouping similar themes together into groups using constant comparative techniques. Tables, Charts and Graphs were used in the examination and presentation of data after analyses.

The findings of the study revealed that parents, teachers, pupils and other stakeholders had accepted the introduction of Free Education Policy (FEP) for Grades 1 – 7. The study further revealed that there was an increase in class enrolments in Grades 1-7. In addition the study also revealed that the majority of urban schools were not happy because revenue base had been eroded with the introduction of Free Education. The findings revealed the inadequacy of grants that were sent late to schools. This also included other free education materials such as chalk, textbooks and so on.

One of the further findings of this study was that parents were not willing to contribute towards school projects. In terms of teacher-pupil interaction at all levels (Grades 1-7), the study revealed that due to big numbers in classes, there was little teacher-pupil-interaction and very little time for teaching and learning due to triple sessions in schools. The study also found that the pronouncement of free education came as a surprise to Ministry of Education officials, School Administrations and Parents and due to this there were no clear plans on how the Free Education Policy would be successfully implemented. The pronouncement was a presidential decree by the Republican President.

CHAPTER ONE

INTRODUCTION

The concept of free education:

In November 1948, the nations of the world made a declaration about the nature and extent of human rights which was remarkable in its detail. Among many others, the right to education was acknowledged for all people. Furthermore, it was declared that elementary education would be free and compulsory and that higher levels of education would be accessible to all on the basis of merit (UN, 1948, article, 26). It is important to state that the convention on the Rights of the Child was adopted in 1989 and came into effect in 1990 it was agreed by many countries. One hundred and ninety (190) countries have so far ratified it. This is the mostly widely accepted human rights treaty and contains strong guarantees of the right to education. It re-affirms the right of every child; without discrimination of any kind to free and compulsory primary schooling, and that higher levels should be accessible to all (UN, 1989 Article 32. 1/32. 2).

According to the *Wikipedia, the free encyclopedia* (2005), Public Free Education is a policy stance in politics that ensures education for its citizens up to a certain level. It goes further to define free education as education that is provided at no cost for students.

The Jomtien World Conference on Education for All (1990)

Globally, the Education for All vision, was derived from the universal declaration of Human Rights (1948) which states that 'everyone has the right to education'. Based on this promise, the World Conference on Education for All in Jomtien, Thailand (1990) adopted two texts, that is; the World Declaration on Education for All and the Framework for Action to meet Basic Learning Needs.

Through these texts the World Community broadened the scope of basic education to include early childhood development, primary education, non-formal learning for youth and adults, and learning conveyed through the media and solid action. It is worth mentioning to state that as a guide to achieve Education for All, the specific goal for primary education was clearly spelt out. The main goal was that all children of school age (7-13 years) were to be enrolled in school, and to complete the requirements of a 7 year primary cycle by the year 2000. This would ensure that all primary school age of children estimated at 2.4 million by the year 2000 would be in school (MOE, EFA Assessment: 2000).

All these efforts were being made to ensure that adults, boys and girls had basic education, which could enable the people to have capacity to shape and improve their own lives.

Ten years after the Jomtien Conference, evaluation exercises were undertaken. For example in Zambia, MOE constituted a team to assess the implementation of EFA. The team comprised Professor Geoffrey Luangwangwa, Professor Dickson Mwasa, Dr. Martin Kamwengo, Dr. Lawrence Mukuka and Getrude Mwape from the University of Zambia and Mr. Emmanuel Silanda, Education For All (EFA) Coordinator from the Ministry of Education. The team concluded that the decade had witnessed more concerted efforts to meet the basic education needs of children. The initiatives such as liberalising participation in the provision of educational institutions, allowing NGOs and other Civil Societies to advocate for the education of children, relaxation in regulation requiring the wearing of school uniforms among many others had contributed greatly to the increase in enrolments in primary schools. (MOE: 1999).

A conference was held in 2000 in Dakar. This conference looked at the progress made by various countries regarding Education For All.

The Dakar Conference on EFA 2000

The Dakar Conference on EFA further reaffirmed the achievement of learning and completion of basic Education for All as a central objective of educational policy in Sub-Saharan Africa. Among the six Dakar Education for All Goals was that of ensuring that by 2015 all children particularly girls, children in difficult circumstances and those belonging to ethnic minorities, had access to and complete free and compulsory primary education of good quality: (ADEA: 2005). This is what Zambia and other countries are striving to achieve.

According to UNESCO – Education for All, (2005), despite notable efforts by countries around the globe to ensure the right to education for all, more than 100 million children, including at least 60 million girls had no access to primary schooling in 2005. Hence, many countries were striving hard to ensure that as many children as possible accessed primary school education, Zambia inclusive.

Why Free Education at Primary School?

The provision of adequate quality free education at Primary school level is crucial to equipping disadvantaged children with the means to contribute to and benefit from the economic growth of the country. This kind of education is one of the most powerful instruments societies have for reducing deprivation and vulnerability. It helps lift potential earnings from any economic venture, helps to expand labour mobility, helps to promote the health of parents and children, reduces fertility and child mortality and affords the disadvantaged a voice in society. It is assumed that the various skills and knowledge received at the primary level will enhance what is stated above.

According to Psacharopoulos et al, (2002), economic analysis has consistently shown that the private rates of return to education estimated on the basis of the relationship between private costs of undertaking education at each level and the impact it subsequently has on a lifetime earnings of people are significant. These earnings at least would be as high as returns from other ways in which families invest their money.

It is also commonly presumed that formal schooling is one of several important contributors to the skills of an individual and to human capital. Further, it is well established that the distribution of personal incomes in society is strongly related to the amount of education people have had. Generally speaking, more schooling means higher lifetime incomes. Any noticeable effects of the schooling on the distribution of skills and income will become apparent some years in the future (Bishop: 1989)

BACKGROUND TO THE STUDY

Provision of Education Before Independence:

The Education System in Zambia has evolved over a long period of time. The first school in Zambia was opened in 1883 by a Missionary. Even then, mission schools did not meet the demand and needs of education for the indigenous Zambians. The mission schools were rarely attended although there were no fees paid by parents. However, the missionaries attracted the pupils to come to school by providing food and clothing (Kelly: 1999).

In 1925, a sub department of Native Education was created following the handover of administration of the territory from the British South Africa Company (BSA.C) to the British Colonial office.

Towards the end of 1930, there was an expansion of Aided Education due to increase in revenue from copper sales that led to increase in enrolments. In 1938, the Munali Training Centre was started, and out of this emerged Zambia's renowned Munali Secondary School. These transformations took place under the Department of African Education that was later transformed into a ministry in 1959.

Despite the country's economic boom from copper revenue, the colonial education system was biased towards educating the non-African population. In 1953, the enrolment for non-African population was 9,464 as compared to less than 200 for the African population (Kelly: 1999).

Prior to independence the enrolment figure for non-Africans had grown to 13,666 and 5,266 for primary and secondary levels respectively. This was far below the indigenous Zambian enrolment. The Federal Government was not fully responsible for African Education. For instance between 1957 and 1962, out of a population of 3 million Africans only 61 students graduated with School Certificates and general certificate of education compared to 1,456 non-African students out of a population of 86,900 (Kelly: 1999).

During the federation of Rhodesia and Nyasaland, the Federal government paid little attention to the development of Tertiary Education in Zambia. There was not a single university in the country and as a result, Zambians were educated in

Southern Rhodesia where a University College of Rhodesia and Nyasaland had been established in 1957 (Ministry of Education; 1964).

Provision of Education After Independence:

At Independence, Zambia inherited an education system that was characterized by inadequacies and imbalances.

There was inadequate infrastructure at all levels. The system was discriminatory by race, gender and totally neglected the tertiary level. Due to this neglect, there were 110,200 (of these 23,300 were females) standard four graduates, 32,400 (of these 4,200 were females) standards six graduates, 4,420 (of these 397 were females) form two and 961 school certificate holders (of these 120 were females). In addition to this, Zambia had less than 100 graduates from the tertiary level at the time of independence (UN/ECA/FAO; 1964)

After independence in 1964, the Zambian government assumed full responsibility for African education and introduced university education. This was in an effort to make education provision beneficial to all and use it as an engine for economic development. In this respect therefore, the government set on a vigorous campaign to expand the education system in the country.

In order to ensure that a number of Zambian children entered school, the new Zambian Government proclaimed "Free Education" in 1965.

To support the free education policy, the Government abolished racial schools in 1966 with the aim of disintegrating the education system further (Education Act: 1966). The system allowed all school going age children to attend school. Similarly, the policy ensured that all the schools were well stocked with educational requisites and employed qualified teachers.

The ultimate goal of the equal system after independence was to provide free education to the Zambian Child.

Introduction of User fees in the 1980's:

According to Kelly et al (1991) the introduction of user fees was as a result of the economic reform that Zambia had begun after the agreements with the International Monetary Fund (IMF) as far back as the mid 1970s. However, more formal Structure Adjustment Programme (SAP) efforts were undertaken in the mid 1980s. The result of SAP saw the re-introduction of fees in schools. There was evidence of decline in school enrolment because of the introduction of fees. For example, primary school fees had risen from twenty kwacha (K20) in 1992 to one thousand kwacha (K1000) in 1994.

This steep increase had occurred at the same time that the income earning capacity of many had been reduced through retrenchments of personnel in industries and other sectors of the economy.

The Zambian Government realized that many children were not accessing basic education. The statistics, for example, showed that in 2001, only 152,032 were enrolled in school out of a population of 342,305 (MOE: 2003). Hence in order to increase enrolment, access and participation of children in education, the government decided to introduce free education for children in lower and middle basic schools (Grades 1 – 7). The Free Education Policy was designed to bring back to school all the children who dropped out and all those who previously had no access to education especially the orphans, vulnerable children and children in difficult circumstances.

Similarly, this policy was made in line with Education For All goals (EFA) such as the improvement of existing schools so as to enable every child enter school by the year 2015; exploring ways of reaching out to children who for a variety of reasons were unable or unwilling to attend school.

Zambia and the International Community had committed itself further to the Dakar Framework for Action, to have all eligible children attending free primary school by 2015.

The two most important Education For All goals under the Dakar Framework were:

- Expanding and improving comprehensively early childhood care and education, especially for girls and the vulnerable.
- Ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities have access to and complete free and compulsory primary education of good quality (UNESCO: 2004).

Free Education Policy:

In order to fulfill Zambia's commitment to achieving the Education For All and Millennium Goals, the government through the Republican President announced in February, 2002 the introduction of Free Education Policy, specifically for Lower and Middle Basic Schools. This meant that children in Grades 1-7 were exempted from paying user fees and other related fees. The Government through the Permanent Secretary of Education issued a Circular to all schools and relevant offices (MOE, Circular No. 3, 2002). The Circular dated March 15, 2002 from the Permanent Secretary read as follows:

"As you are aware, the Republican President, His Excellency Mr. Levy Patrick Mwanawasa, SC has announced the introduction of Free Education at Grades 1-7 with effect from this year".

Accordingly, the following should be:-

- No pupil at Grades 1-7 should be levied any user fees including PTA levies. Instead PTA may raise funds for specific school projects through raffles and other legitimate means after getting clearance from the Provincial Education Officer.
- No pupil should be denied enrolment or excluded from school for failure to contribute to PTA fund raising activities.
- Enrolment of pupils shall be unconditional and should not be linked to contributions of items such as cement, reams of paper, slashers, etc.
- School uniform is not compulsory and no pupil should therefore be prevented from attending school on account of failure to obtain it. Schools that choose to continue with the uniform requirement should not commercialize its acquisition turning it into a fund-raising venture. Uniform should be plain and simple and parents must be allowed to get from the cheapest source.
- Teachers should note that remedial teaching is part of their professional responsibility and should therefore not charge children for extra tuition with the schools.

Also extending an invitation to all pupils who dropped out of school (no queries made) and hereby request all the Provincial Education Officers, District Education

Board Secretaries to mount campaigns in their areas to bring back to school as many children as possible. Responding to the announcement, the Ministry has decided to provide exercise books, pens, pencils, rubbers and rulers to Grades 1-7 pupils and basic teaching and learning materials like chalk, notebooks, chart paper, felt pens etc, for teachers.

Exactly, this study attached great importance to finding out, whether or not the introduction of Free Education Policy in Lower and Middle Basic Schools had affected the various stakeholders alluded to above.

Missing Link:

The announcement of Free Education Policy had been met with resistance in certain quarters of our society. While some rural schools seem to have accepted the introduction of free education to a certain extent, the majority of urban schools were not happy with the introduction of Free Education.

Comments from people in society had an impact on how the general public perceived the free education policy. For example, a former Permanent Secretary in the Ministry of Education, Sichalwe Kasanda (1993-2002) was quoted to have said that "the danger of offering free education was that it could create a syndrome of dependency in citizens on the government, as even those who could afford to pay for education would want it free. You disempower people who are already empowered.

This would be translated into increased costs for the government” (The Post Thursday, September 23, 2004).

Mwansa et al (2003), acknowledge the fact that the free education policy has been understood by most communities as government taking over all responsibilities related to meeting the costs of education. Mwansa et al (2003) further in their study, for example, believe that the introduction of free education had led to marked increase in pupil enrolments. Girls enrolment, for instance rose by 4.6% from 11,095 in 2001 to 11,605 in 2003 while that of boys rose from 10,553 to 11,018 for the same period. However, what the study did not indicate was whether the increase in enrolment had positive or negative effects on the teacher-pupil ratio, use of infrastructure, quality of teaching and learning and whether these had led to proportionate distribution of free education materials.

Meki: (2004), Sikwibele: (2003) and Mwansa et al (2003) in their studies do acknowledge that the school grants provided were not adequate in most of the big schools such as those found in Ndola District where the schools have to pay utility bills as compared to rural areas. Meki, Sikwibele and Mwansa et al do not clearly come out in their studies to explain how those grants have affected the performance, the school infrastructure, the teaching and learning process of children. For example, were the grants adequate or inadequate for the lower and middle basic schools.

Furthermore, a one day visit by Richard Arden; Education Advisor for Department of Foreign and International Development (DFID) in Zambia to Kitwe on 15th July 2004 to determine the impact and implementation of Free Primary Education (FPE) revealed that some parents had interpreted Free Primary Education to mean no parental support or contribution to their children's education. This visit did not give us the insight of the understanding of the rural communities because his visit was done in Kitwe Urban. More over this visit did not give the comparisons regarding the positive or negative effects of the introduction of Free Basic Education.

It was therefore necessary for currently study to find out whether the introduction of free education policy had negative or positive effects on teachers, parents, school administrators, pupils' enrolments, infrastructure and overall the Ministry of Education.

Statement of the Problem:

The Ministry of Education introduced the Policy of Free Education for Lower and Middle Basic schools in 2002. Since then, only two studies have been undertaken to find out the effects of the Policy.

The studies by Meki (2004) and Mwansa et al (2003) left a number of gaps. As a result the Ministry of Education still has very scanty information on the effects of the policy. Hence this study.

Purpose of the Study:

This study sought to find out the effects of the introduction of free education in Lower and Middle Basic Schools (Grades 1 – 7) in selected schools in Ndola and Masaiti districts of the Copperbelt province.

Objectives of the Study:

The following were the objectives of the study:

1. To find out the enrolments before and after the policy on Free Education.
2. To find out the effects of the free education policy on enrolments, teachers, parents, and schools themselves.
3. To establish the grants schools received before and after the introduction of free education.
4. To find out the effects of free education on the Ministry of Education.

Research Questions:

1. What was the enrolment like before and after the policy on free education in 2000/2001?
2. What are the effects of the free education policy on the following: teachers, parents and schools themselves?
3. What were government grants to school before and after the free education policy?
4. What are the effects of free education on the Ministry of Education?

Significance of the Study:

The findings will help the policy makers in government and the Ministry of Education in particular, to have a clear picture and understanding of the effects and implications regarding the introduction of free education policy at Lower and Middle Basic Schools. This information might further help the Ministry of Education to improve upon the implementation of the policy.

Limitations:

This study should have been extended to all lower and middle basic schools in the Copperbelt Province but was only limited in Masaiti and Ndola Districts due to time and inadequate funding from the sponsors.

CHAPTER 2

2.0. LITERATURE REVIEW

Overview

This chapter reviews literature related to studies and works on free education policy at International and National levels.

2.1 International Level:

In November, 1948 the nations of the world made a declaration on the right to education for all people and article 32.1/32.1, reaffirmed the right of every child without discrimination of any kind to free and compulsory primary school education (UN, 1948, Article 26).

• Nancy, Birdsall et al (2000) in the study under the United Nations Project “Task Force on Education and Gender Equality” reported that the current donor support to ensure that every child is enrolled in a quality primary school is at US\$1.2 billion annually, which is much less than what is needed, estimated at between \$7 and \$17 billion between 2005 –2015. The study further acknowledged that there were more than 100 million children out of school at present. Hence the study made many recommendations such as depending on local conditions, countries should introduce and scale up specific interventions and actions such as removing school fees,

introducing conditional transfers and school feeding programmes, and actions to improve the security of girls, as a way of encouraging out of school children back to schools (UN Millennium Project Task Force: 2005).

The Jomtien Conference of 1990, the Dakar Conference of 2000 and the 2000 Millennium Conference all emphasized on the need to provide Education For All by the year 2015. This was the reaffirmation of the earlier pledges in the 1948 declaration that education was a right (UNESCO Report 2003/04). A number of European countries which recognized that education was a fundamental human right have since provided free education. Countries such as Norway, children start compulsory education the calendar year in which they turn six. The general rule is that pupils attend the public school that is closest to where they live or the school designed for the catchments where they live. Compulsory education is free in public schools, but pupils in private schools pay a fee. Therefore Education For All is the basic principle of Norwegian Education Policy (Norwegian Ministry of Education Research: 2005). Countries such as France, Sweden, Denmark, Finland, Belgium and Austria provide free education for children at the age of three. The system is that almost 100% of children enroll in school (ufd.dep.no).

Education from primary to higher school level is free because all the necessary provisions such as; books, meals and transport to and from school are given to pupils. The citizens of these countries pay substantial taxes towards financing education (Education in Norway: 2005).

The practice of introducing free compulsory education especially at primary school level was not only confined to European and other developed countries. A number of African countries have in the recent past advocated for free and compulsory education as a result of different factors in these countries. For example, high school fees, high poverty levels at household and national levels among many others were/are the mitigating factors for the introduction of free education in some African countries.

A study by Weir (2000) noted that the high school fees levied against parents and children had adversely affected the school enrolments. Pupils in most schools stayed away because they could not afford the fees. Due to poverty at household level, many parents and children decided to make ends meet by sending their children to do chores that could bring in money rather than going to school. The direct costs of schooling on households were made up of tuition or other fees, and the costs of purchasing books, school uniforms and transport to schools.

Household decisions to educate the children respond to changes in the cost of these items. Studies by Jimenez (1987), Birdsall and Orivel (1996) in Mali, Weir (2000) in Ethiopia confirm this larger and significant effect among a sample of poor households.

The level and type of fees imposed vary between countries. A recent study by Tomasevski (2003) and the World Bank (2002) undertaken across seventy nine countries (Zambia inclusive) showed that seventy seven of them had at least one kind of fee at primary school level. The most prevalent fee was Parent Teachers' Association (PTA) or community contributions charged over 70%. The cost of textbooks and uniforms were also commonly assigned to parents as were for sports and other activities. It is noteworthy that these charges were levied in a substantial proportion of countries where it is formally illegal to do so.

The Education For All reports (2003/2004) and (2004/2005) indicated that a number of countries had introduced the free education policy at primary school levels. The countries included, Malawi, Kenya, Tanzania, Lesotho and Zambia among others (UNESCO: 2004, 2005). In all the five countries mentioned, the announcement of Free Primary Education had been seen as a defining moment. The African countries that introduced free education policy recognized the many implications of reducing the cost of education to parents, reacting to the enrolment surge and the provision of quality education.

Mtegha (2003) stated that although the free primary education was introduced with the good intentions of increasing access to education, Malawi faced problems regarding the financing of the programme. This was more especially that its economy was 'already weak'. An examination of the free primary education programme indicated that primary schools had seen a large increase (100% enrolment) in a number of pupils going to school. The increase in access had however, brought about a significant decline in the quality of education because it had put further strain upon the already under resourced education system. The schools became over-crowded; schools experienced a shortage of teachers, teaching and learning materials and other facilities. The result had been that the education standards in Malawi had continued to decline.

According to Integrated Regional Information Network (IRIN) (7th February, 2003), the Kenyan Government's declaration of the Free Primary Education yielded positive results in terms of the number of children in school. The 1.5 million children for example who were out of school had turned up to attend classes after the declaration of Free Education Programme. However, IRIN (7th February, 2003) indicated that the government did not consider the costs and logistical challenges involved in delivering free education.

Furthermore, according to Pembezuka News (2004), a study commissioned by the Kenyan government reviewed that despite the introduction of free primary education, the District Education Boards were forcing the parents to finance "Mysterious Programmes". Hence education in this case was not viewed to be free.

The experiences of Malawi and Kenya in as far as providing free education is concerned merely confirm what Graham-Brown (1996:34) stated that, governments in developing countries that might aim to provide free education were likely to face serious problems of financing and upholding the quality of education.

Graham-Brown (1996), further stated that, even in countries where primary education had not been declared free, inadequate resources in the education system has had negative effects on the quality in terms of inputs and outputs. Poor funding of the education system in most of the schools in developing countries had meant the scarcity of textbooks, chalk, chalkboards, desks and many other teaching and learning requisites. Poor resourcing of the education system had also affected the maintenance of buildings and school property so much that leaking roofs, lack of water and electricity were not uncommon problems in Africa.

For example, 42% of the schools in Tanzania were without water hence the schools were able to charge their own fees for maintenance and the pupils still had to provide uniforms and stationery. Further literature reviewed that Ghana had launched the Free Compulsory Universal Basic Education (FCUBE) Programme in 1996. This was further enshrined in the country's constitution. The children were expected to enter school freely but parents were expected to provide uniforms and stationery for their children (Ghana Education System: 2004). Chapter III Article 28(b) of the Lesotho Constitution clearly states that Primary Education was compulsory and available to all. In this regard parents were only expected to provide uniforms and stationery to their children (Lesotho Government: 2005).

- The introduction of free education in a number of African countries though welcome had faced a number of criticisms from a cross section of people. According to African Woman Magazine (2003), Free Education comes at a high cost. It was stated in the article that while it was good that enrolment jumped from 2.7 million to 7.5 million, this defied the reality because teachers for example were not able to cope with the numbers. It had been argued that before the introduction of free primary education, it was easier to cater for the needs of pupils with special needs but this was not the case now. Similarly, headteachers have had their own battles with Ministry Headquarters over extra levies.

The Headteachers argue that projects initiated by parents had stalled because the government had not set aside money to complete them. The government, however, on its part was happy that free education was a major breakthrough in itself.

- According to Wambui Mwangi of the *Kenya Times* (2003), the introduction of free education in Uganda was overwhelming and parents were happy that their children would never be kicked out of school. However, the government cautioned that the free education concept could be misleading because there were some costs to be incurred by parents and teachers associations, in the provision of education for the children and teachers. The government only catered for tuition fees for four pupils per family, other requisites were the parent's responsibility. The parents were informed about their responsibility so that government could not be blamed for wrong interpretation regarding free education on the part of the parents. Further literature on free education has cautioned people who have introduced it to be conscious of the consequences. Andrew Alphonse (2003) stated that, every country would want free education, but the facts were that it was simply not possible with the kind of economies found in a good number of countries. Free education was not just possible because it could have serious effects on the education system over a long period.

He further stated that, it would require a lot of money to be spent on infrastructure, maintenance and training of more teachers to cope with expected increases (*The National Times*: 2003).

2.2. The Zambian Situation:

The pronouncement of free education at Grades 1-7 by the President of the Republic of Zambia meant that the children in Grades 1-7 were exempted from paying user fees and other related fees. The Permanent Secretary in the Ministry of Education issued a circular to that effect (ME/71/126 circular No. 3, 2002 dated 15 March, 2002). The pronouncement of free education was a result of many children not accessing education. This was so with the girl child, the orphans and other children in difficult circumstances.

Literature in the Ministry of Education indicated that for example, by 1996, there were 3,715 government schools in Zambia with a total of 157,660 pupils in grades 1-7, this was an average enrolment of 400 pupils in urban areas as compared to the schools in rural areas (MOE: 1996). In 2001, only 152,132 were enrolled out of a total population of 342,355 (MOE: 2003:22).

Various studies had stated that the poor enrolments in schools could be attributed to a number of reasons, these included; parents marrying off their daughters at an early age, (this was common in rural areas) the harsh economic situation in the country and poverty in a number of households. Kelly (1991) and Sikwibele (2003) in their studies revealed that from 1965 to the mid 1970s the economy of the country enabled the government to provide free education to its citizens.

- ✓ The government during this time provided adequate funds to the Ministry of Education and in turn provided exercise books, text books, pencils, pens and so on to the learners. It ensured that teachers were trained and deployed to all schools. This was done by building new teachers training colleges in all provincial centres.
- ✶ The declining economic situation in the 1980s led to the reversal of education policies which led to abolition of free education. Kelly (1991) mentioned that a lot of constraints arose as a result of the economic crisis. The constraints hinged on the provision of adequate and relevant quality education. The result was that an emergency cost-sharing policy was introduced in 1986. The 1988 National Development Plan expected parents to be involved in the educating of their children through cost sharing. However, despite the reversal of education policies, the country's economy from the 1980s to 2001 had not improved to an extent where each household would be able to provide adequately for school requisites.

*In a study by Milimo et al (2000) there were trends and changes in education from 1992 -1999 whose factors affected the accessibility to education and these mitigated most strongly against children from households that could least afford the cost of education. This study covered how households were being hindered from sending their children to school as a result of the so many levies or fees demanded by the school. Kasonde-Ngandu et al (2000) also revealed that the schools as a result of cost sharing were demanding too much from parents and pupils. Pupils and parents were expected to pay for teachers farewell events, contribute towards teachers' functions and so on. The study further found that in some cases children would not be allowed to attend school if they were not able to afford books, pens or adequate clothing. There was a lot of imposition of fees without consultations with Parents Teachers' Association by some school headteachers.

The pronouncement of the free education policy had theoretically addressed some of the issues raised by Kasonde-Ngandu et al (2000). The children had no more hindrance to attend grades 1-7. Mwansa et al (2004) in their study found out that there had been a marked increase in pupil enrolments that was attributed to the implementation of the free education policy. Girl's enrolments, for instance, rose by 4.6 percent from

11,095 in 2001 to 11,605 in 2003 while that of boys rose from 10,553 to 11,018 for the same period. The number of returning pupils in government schools also increased. In 2003, 1,817 pupils had returned to school after having dropped out earlier. More than half (51.9%) were girls.

The free education policy had financial implications. Meki (2003), Mwansa et al (2004) in their study revealed that government grants that were provided to implement the free education policy were not adequate especially in most urban and big schools. Schools in urban areas were expected to pay utility bills hence the Grades 8 and 9 pupils were being levied in order to subsidize the grades 1-7. According to Meki (2003), spending on the teaching and learning materials had decreased over the years. Literature from MOE (1992), Kelly (1991) and Lungwangwa (1994) stated that the level of teaching/learning materials in primary schools had reduced as a result of governments' poor funding to the Ministry of Education as far back as 1986 resulting in inadequate provision of the teaching/learning materials in schools.

Similarly, the inadequate funding of the free basic materials to schools had guaranteed a lot of talk among the citizenry. The people were questioning whether the government was providing free education after all. The inadequate funding of schools could have been as a result of over dependence on donor support.

Coklough et al (2003) in their study on the quality of education that was being offered in the countries that had introduced free education revealed that various donors or partners and agencies provided over 50% of the education. For example, various agencies in Zambia covered 27% of total expenditure in 2000, approximately 50% of basic education budget. The reduction in budget allocation by donors to the Zambian government literally affected the expenditures in education provision. The question that was being asked by some people was whether external funding from donor or partners would sustain the free education in countries such as Zambia.

According to Mwansa et al (2004), the free education policy had been understood by most communities as government taking over all responsibilities related to meeting the costs of education. The dependency syndrome by the communities had in a way been deepened. A former Permanent Secretary for the Ministry of Education from 1993 – 2003, Dr. Kasanda cautioned that, the danger of offering free education was that it could create a syndrome of dependency in citizens on the government, as even those who could afford to pay for education would want it free. You disempower people who are already empowered. This would be translated into increased costs for the government (*The Post Thursday, September, 2004*).

The then World Bank country representative, Lawrence Clarke also had warned the government against the adoption of education reforms similar to those undertaken in other African countries where scrapping of school fees had seen an increase in enrolment, but not in the provision of quality education. Clarke (2002) observed that: The initiative to abolish fees should be well planned in advance, providing not only for replacement of fees revenue by Public Funds, but also taking into account likely substantial increases in enrolment, and the consequent needs for increases in school input (IRIN, 2002).

In a Similar fashion, the coordinator of the economic and social development research project of the Jesuit Centre for Theological Reflection (JCTR) Muweme Muweme also told IRIN (February, 2002) that it was abundantly true that without certain pragmatic steps in the direction of resource mobilization, Zambia was going to find it extremely difficult (if not impossible) to offer free basic education.

*The study by Meki (2003) concentrated on how the quality of education had been affected as a result of the poor funding in the Ministry of Education vis-à-vis the introduction of free education. The study did not show the positive effects of free education on the parents, teachers, pupils, school administrators.

The negative aspect had been portrayed throughout the study. Similarly the study by Mwansa et al (2004) found that the free basic education policy had an effect on the communities, but the study had dwelt much only on the negative aspect of community participation. Further, Mwansa, et al (2004), concentrated on assessing the implementation of the free education policy in a general manner and as a result did not show details. The study did not show the incomes of schools in lower and middle basic schools before and after the free education policy. Furthermore the study did not show how the free education policy had positively or negatively affected the various stakeholders in the school and community. It is against this background that the current study was conducted with the view to filling these gaps.

CHAPTER THREE

METHODOLOGY

3.0. Introduction

This chapter discusses the methodology used in this study. It gives the description of the research design, target population, sample size sampling procedure, research instruments, validity of instruments, and data collection procedure. Problems encountered during data collection data analysis and data interpretation have also been discussed in the chapter.

3.1.0 Research Design

The study took a form of a survey. According to Cohen and Manion (1980:71) "typically, surveys gather data at a particular point in time with the intention of describing the nature of existing conditions or identifying standards against which existing conditions can be compared or determining the relationships that exist between specific events".

3.2.0 Population

The target population was all Lower and Middle Basic Schools in Masaiti and Ndola Districts. The population of the pupils in Grades 1-7 in Masaiti by gender was 11,704 male and 10,787 Female, giving a total of 23,491 pupils. There were 39,341 male 41,809 female pupils in Ndola District.

The total number of teachers and Headteachers in Masaiti and Ndola Districts were 2,198 and 460 respectively (MOE: 2005).

3.3.0 Sample Size and Sampling Procedures:

A sample of 12 schools, 60 class teachers, 120 pupils, 48 parents, 12 Headteachers, 1 DEBS, 1 DESO, 1 SESO and 1 Human Resource Officer was drawn using a stratified random sampling procedure for Masaiti and Ndola Urban. Further, purposive sampling was used to select 6 Ministry of Education officials.

3.4.0 Research Instruments:

- The data was collected using questionnaires for Headteachers and teachers.
- Semi-structured interviews were used to interview Ministry of Education Staff such as District Education Board Secretaries, Provincial Education Officer, Directors and Ministry of Education officials at headquarters.
- Focus groups discussions were used with pupils and parents; and lastly, Documentary review of free education materials for schools and also documents pertaining to funding of districts regarding free education policy were analysed.

The questionnaire for headteachers consisted of 11 questions while that for teachers consisted of 6 questions. There were 9 questions for semi-structured interviews for Education Managers, while 10 questions each were prepared for focus Group Discussions with parents and pupils.

The response rate for the questionnaires for Masaiti and Ndola Districts were 80% and 95.94% respectively.

3.5.0 Validity of Instruments:

Fisher et al (1991) state that the validity is the extent to which an instrument measures what it is supposed to meet. Hence, before the study was conducted the validity of the instruments to be used was taken into consideration. A pilot study was undertaken at Lusaka Girls Basic School. The teachers and headteachers were subjected to the draft questionnaires and Focus Group Discussion was done with pupils and parents.

3.6.0 Approval:

The collection of data was done between the 9th May and 31st August, 2005. The Researcher upon receiving a letter from the Assistant Dean Post Graduate Studies on the 6th May, 2005 travelled to the Copperbelt Province.

The Provincial Education Officer was informed and permission was given for the Researcher to carry out his study in Masaiti and Ndola Districts. At every district the Researcher first met the District Education Board Secretary before proceeding to schools.

3.7.0 Data Collection:

The following were the techniques used to obtain data:

3.7.1 The Administration of Structured Questionnaires to Headteachers, Teachers and Some Parents:

One set of questionnaires was administered to the 12 Headteachers (6 Headteachers in Masaiti and 6 Headteachers in Ndola Urban Districts). Another set of questionnaires was administered to 57 teachers in the two districts and the other questionnaires were administered to 10 parents. The researcher read out the instructions before the respondents filled in the questionnaires.

The questionnaires were filled in during the respondents' free time although the researcher had given a time frame of 10 days in which he would collect the questionnaires. However, for Masaiti district, the researcher had to wait at each school to collect the questionnaires because of the nature of the district which had schools scattered in distant places. Hence it would have been difficult to collect the questionnaires if these were left in schools.

In order to ensure anonymity and confidentiality, headteachers, teachers and parents were told not to write their names.

The researcher used a tape recorder in both districts as a way of collecting data during Focus Group Discussions and interviews with Ministry of Education officials, pupils and parents. Further, in-depth interviews were conducted with teachers and headteachers so as to beef up or to capture information which was captured in the questionnaires. More data was enlisted from schools through documentary review which could have been missed from the questionnaires.

3.8.0 Problems Encountered During Data Collection:

The Researcher faced a number of problems while collecting data. It was difficult to collect data from the District Education Board Secretary's office regarding the distribution list of free education materials in both Ndola and Masaiti Districts. It was also not easy to meet parents and teachers especially in Ndola despite the Researcher's initiative to visit schools prior to the actual day of administering the questionnaires and interviews.

The Ministry of Education Headquarters staff were difficult to get due to their heavy schedule.

The Researcher encountered long distances between schools in Masaiti District being rural and vast. The Researcher hired a vehicle to use from his own resources so as to visit these distant schools. The funds were not adequate enough to cover this unforeseen challenge.

The other problem faced by the researcher was that pupils in Masaiti District schools and some parents could not speak English, hence Focus Group Discussion was done in vernacular (Bemba), and the researcher had to decode this discussion into English.

3.9.0 Data Analysis:

Quantitative data was analysed using a computer software called Statistical Package for Social Sciences (SPSS), so as to generate tables of frequencies and percentages.

Qualitative data was analysed by comparing and grouping (categorizing) respondents' opinions. Emerging themes from data obtained were subsequently grouped or categorised and then interpreted.

3.10.0 Data Interpretation:

Quantitative data was interpreted by use of tables, frequencies and percentages. For qualitative data, categories and themes were considered and interpreted accordingly.

3.11.0 Ethical Considerations:

Confidentiality:

During the research, the headteachers, teachers and pupils were assured that the information they gave would be treated with utmost confidentiality. The same assurance was given to Ministry of Education officials

CHAPTER FOUR

FINDINGS OF THE STUDY:

4.1.0 Respondents Geographical Location:

The respondents were from two districts, namely, Masaiti and Ndola. Masaiti district is basically a rural district while Ndola is urban.

4.2.0 Respondents' sex:

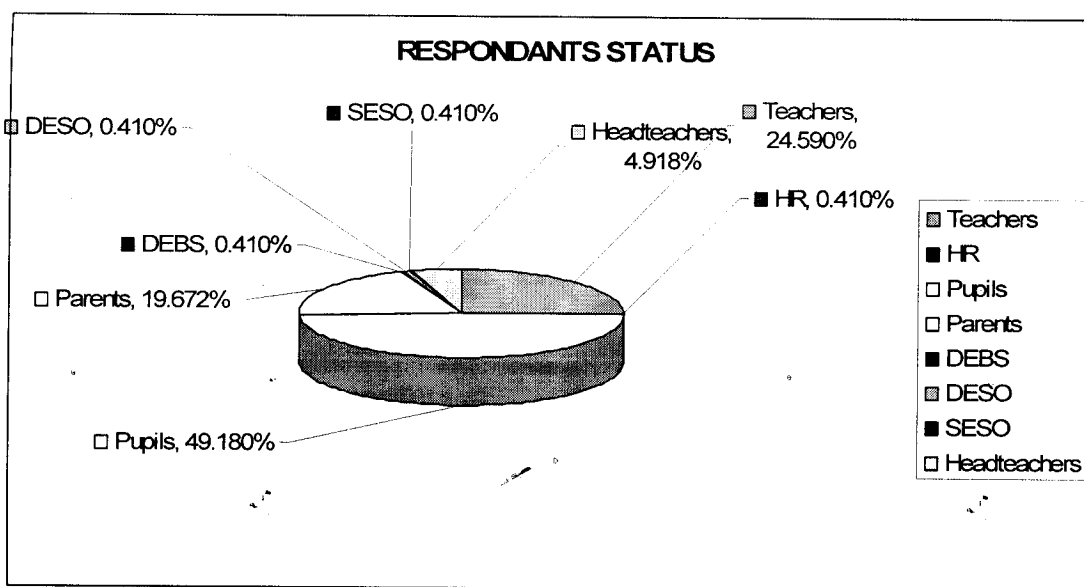
There were 244 respondents who participated in the study, these 82 (33.3%) were female and 162 (66%) were male

Table 1:

SEX	MASAITI DISTRICT		NDOLA DISTRICT	
	RESPONSE	%	RESPONSE	%
MALE	78	67.24	84	66.8
FEMALE	38	32.8	44	34
TOTAL	116	100	128	100

4.3.0 Respondents Status:

There were 60 class teachers, 12 Headteachers, 48 parents,120 pupils, 2 District Education Board Secretaries (DEBS), 1 Education Standards Officer (ESO), 1 Human Resources Officer (HRO), 1 District Education Standards Officer (DESO) and 1 Senior Education Standards Officer(SES). (See chart next page)



Teachers Responses:

4.4.0 Awareness of the free education policy:

100% of teachers who answered the questionnaire in Masaiti and Ndola District were aware of the free education policy. They had seen and read the circular on free education policy from the Ministry of Education.

Table 2:

RESPONSE	FREQUENCY	%
Aware of free education policy	60	100
Not aware of free education policy	0	0
Total	60	100

4.5.0 Effects of free education policy on the teaching and learning process:

The study found out that the teachers in Masaiti District had begun to handle bigger classes, that is, from 30 pupils per class to 50 pupils in a class. This was typical of Masaiti Basic School.

Further, 91% of teachers in Masaiti District said that it had become difficult to give individual attention to pupils. The teachers handling grade 1 classes revealed that with the increases in enrolment it had become very difficult to use the Primary Reading Programme (PRP) methodology. This methodology requires intensive preparations for individual groups.

Table 3: Masaiti District

Response	Frequency	%
Teachers not giving individual attention to pupils	27	91
Teachers giving individual attention to pupils	3	9
Total	30	100

In Ndola District, the study also revealed that 87.5% of teachers were of the view that there was little individual attention given to pupils as a result of the increased numbers in classes.

Table 4: Ndola District

Response	Frequency	%
Teachers not giving individual attention to pupils	26	86.7
Teachers giving individual attention to pupils	4	13.3
Total	30	100

The study in Masaiti District revealed that although there had been improvement in enrolments, school records showed that 20% of the total enrolments were not attending school regularly. It was further reported that pupils could report to school at will, knowing very well that they could not be sent away because it would be against the free education policy. In Ndola District, the rate of absenteeism was as high as 22%. 23 teachers out of 30 teachers (78%) disclosed that there was low absenteeism amongst pupils despite the bigger numbers.

The teaching and learning process had also been affected in both districts in terms of class performance. For example from the questionnaires in Masaiti in table 5, 12 teachers out of 30 in Ndola District revealed that the pupils in grades 5 – 7 were performing slightly above average (table 6)

Table 5: Masaiti District

Response	Frequency	%
Pupils performing below average	12	40
Pupils performing above average	18	60
Total	30	100

Table 6: Ndola District

Response	Frequency	%
Pupils performing below average	15	50
Pupils performing above average	15	50
Total	30	100

4.6.0 Teachers views on the effect of free education policy on the school:

The study in Masaiti District found out that for the first time the schools had begun to receive grants ranging from K2.6 million for smaller schools like Mulofwa Basic School to K3 million for schools like Masaiti Basic school. These schools could hardly raise more than K500, 000 per year before the introduction of free education policy. However, the study revealed that the free education materials were not part of the grants that were sent to schools.

The teachers disclosed that the free education materials were not sent to schools regularly. Hence, pupils had continued to buy the school requisites.

The study in Ndola District found out that the introduction of free education policy had disadvantaged the schools. Ndola District schools previously raised over K120 million per year. Hence with the abolition of school fees and other levies, the school budgets had reduced drastically.

The study also revealed that the Ndola District schools received the same grant allocation as those obtained in Masaiti. 21 teachers (72%) out of 30 were of the view that the K3 million which the schools received was not adequate enough to cover the many expenses that the town schools were expected to pay for utility services.

4.7.0 Teachers’ positive and Nègative views on the free education policy:

The study revealed that 60 teachers (83%) of teachers in Masaiti and Ndola District were of the view that the pronouncement of free education policy was done hurriedly without proper consultation among teachers and other stakeholders.

Table 7:

Response	Frequency	%
Free education policy pronouncement was done hurriedly	50	83.33
Free education policy pronouncement was timely	10	16.67
Total	60	100

The sudden pronouncement of free education policy had put the schools’ developmental work plans in disarray. The funds that were projected to be raised could not be raised.

Masaiti Basic School and Mawilo Basic School in Ndola could not continue to rehabilitate classrooms and construction of the wall fences due to lack of money for these projects. The teachers in both districts disclosed that pupils had continued to buy exercise books, pens, pencils and other necessary requisites.

The study revealed that despite the negative views expressed by teachers about the free education, 27 teachers out of 30 (90%) in Masaiti District and 90% of teachers in Ndola District were of the view that free education should be continued, but argued that the government should increase funding to big town schools and provide free education materials regularly and in good time.

4.8.0 Recommendations from teachers:

The teachers agreed with the principle of free education, however, if the education policy was to be successful, the government should:

- revisit the policy and make further consultations with other stakeholders who were not considered for example, teachers and teachers' unions.
- increase grants to schools and released in good time.
- encourage parents to send their children to schools, hence there must be good incentives for children in schools.

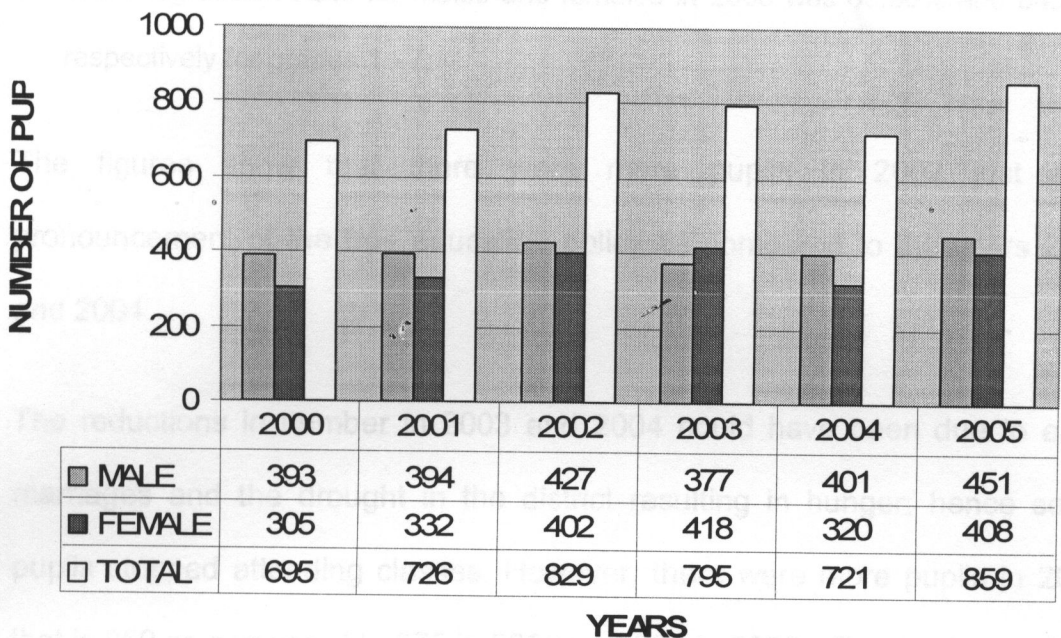
4.9.0 Headteachers Responses:

4.9.1 Enrolment in Grades 1 – 7 in some selected Basic Schools in Masaiti and Ndola Districts:

The study found out that there was an increase in school enrolments since the introduction of free education; for example, Lumano Basic School in 2001 had an enrolment of 206 pupils that is 89 males and 117 females. By 2004 the school had increased its enrolment to 358 that is 110 males and 176 females. Similarly Fibobe Basic School in Ndola District in 2001 had an enrolment of 380 males and 337 females giving a total of 717. In 2004, the school had an enrolment of 707 males and 691 females giving a total of 1,398. Further illustrations in Fig. 2 show the enrolment in grade 7 by gender at Fiwale Basic School in Masaiti District from 2000 to 2005.

The years 2000 to 2002 reflect the enrolments before the introduction of free education policy and the years from 2002 to 2005 reflect the enrolments after the introduction of free education policy. (*see graph next page*)

ENROLMENT BY YEAR AND GENDER, GRADES 1-7, FIWALE BASIC



- The Progression Rate for males from Grades 1 – 7 was 40.00% and 36.71% for females in 2000.
- The Progression Rate for males from Grades 1 – 7 was 47.95% and 50.85% for females in 2001.
- The Progression Rate for males from Grades 1 – 7 was 32.84% and 22.54% for females in 2002.
- The Progression Rate for males from Grades 1 – 7 was 42.67% and 37.88% respectively in 2003.

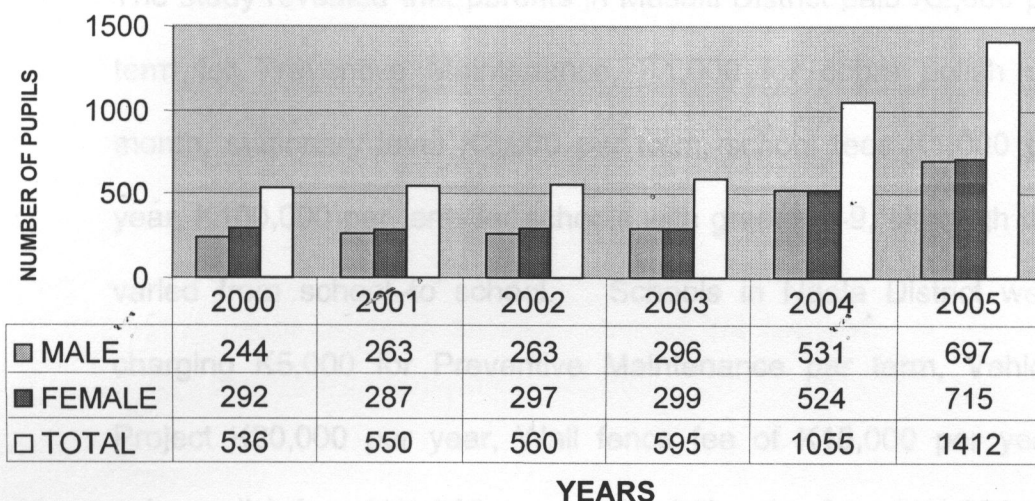
- The Progression Rate for males from Grades 1 – 7 was 34.27% and 18.52% for females respectively in 2004.
- The Progression Rate for males and females in 2005 was 86.90% and 84.31% respectively for grades 1 - 7.

The figures show that there were more pupils in 2002 just after pronouncement of the free education policy as compared to the years 2003 and 2004.

The reductions in number in 2003 and 2004 could have been due to early marriages and the drought in the district resulting in hunger; hence some pupils stopped attending classes. However, there were more pupils in 2005 that is 859 as compared to 675 in 2000 and 829 in 2002. The rise in numbers was as a result of intensive sensitization regarding free education in the community.

Fig. 3 shows enrolments in grades 1 – 7 by gender at Simon Mwansa Kapwepwe School in Ndola District from 2000 to 2005. The years 2000 to 2002 reflect the enrolment before the introduction of free education policy and the years from 2002 to 2005 reflect the enrolments after the introduction of free education policy. (*see chart next page*)

ENROLMENT BY GENDER AND YEAR GRADES 1-7, SIMON MWANSA KAPWEPWE BASIC SCHOOL



- The Progression Rate from grades 1 – 7 in 2000 was 91.67% and 82.05% for males and females respectively.
- The Progression Rate from grades 1 – 7 in 2001 was 85% and 100% for males and females respectively.
- The Progression Rate for grades 1 – 7 in 2002 was 85% for males and 100% for females.
- The Progression Rate for grades 1 – 7 in 2003 was 27.5% for males and 15.0% for females.
- The figures in Fig. 3 shows that there was steady rise in the enrolments after the introduction of free education that is the number rising from 560 in 2002 to 1412 in 2005.

4.10.0 Levies paid by parents before the introduction of free education policy:

The study revealed that parents in Masaiti District paid K2,000 per term for Preventive Maintenance, K1,000 for cobra polish per month, stationary level K2,000 per term, school fees K1,000 per year, K100,000 per term for schools with grades 8-9, although this varied from school to school. Schools in Ndola District were charging K5,000 for Preventive Maintenance per term, Vehicle Project K20,000 per year, Wall fence fee of K15,000 per year, cobra polish fee of K1,000 per month, civilian day fee of K1,000 per month, school fees of K1,000 per year and K120,000 user fees per term. These fees varied in the six schools understudy.

4.11.0 Levies paid by parents after the introduction of free education policy:

The six Headteachers in Masaiti District revealed that parents were not paying any statutory fees or other fees levied by the Parents Teachers' Association (PTA). However, Masaiti and Milofwa Basic Schools were still asking pupils to contribute K1,000 per month for cobra polish.

The study revealed that levies for cobra polish and sweeping brooms (K1,000 per month) were still being surcharged on pupils at

Masamba, Mawilo and Simon Mwansa Kapwepwe Basic Schools.

The PTA at Mawilo Basic continued to charge K10,000 for PTA fess and K5,000 as project fees. The school administrator and the PTA had argued that there was no way of sustaining themselves if pupils and parents could not pay for utility services being offered at school.

4.12.0 Funds received from Government of the Republic of Zambia (GRZ) before free education policy:

The study revealed that Headteachers in Masaiti and Ndola Districts received no funds directly from the Ministry of Education, but through the District Education Board Secretary. However, from 2000 to 2002 schools received funds under the Basic Education

Sub-Sector Integrated Programme (BESSIP), and the funds were in the range of K2 million for smaller schools to K3 million for bigger schools.

4.13.0 Funds received from GRZ after free education policy:

12 Headteachers (100%) revealed that the K2.6 million and K3 million grants were being given to them to spend by the district offices. However, there had been a fluctuation in funding to District Education Boards. Table 8 and 9 show the annual provisions of funds to Masaiti and Ndola District in 2004 and 2005.

Table 8: 2004 Annual Provisions

District	
Masaiti	K154,371,000
Ndola	K587,007,000

Table 9: 2005 Annual Provisions

District	
Masaiti	K 93,831,000
Ndofa	K242,638,000

4.14.0 Headteachers’ response regarding parents and community members’ response towards the introduction of the free education policy:

100% of Headteachers in Masaiti District revealed that the parents were happy with the introduction of free education policy.

4.15.0 The effect of the Education Policy on Headteachers:

The study revealed that the six Headteacher respondents in Ndola District were not very comfortable with the introduction of the free education policy. They felt that the pronouncement of the free education policy was a blanket statement that would benefit schools in rural areas rather than in urban schools which were faced with massive bills, for example, electricity, water, and telephone bills.

The schools that were able to raise K40 million to K45 million per term through levies were now given K3 million per term. This was a big change in the school budgets.

The study further revealed that the Headteachers were not able to pay sanitary workers, school watchmen and school handy men. These were paid by the school PTAs after the government retrenched them as far back as 1995. It also revealed that other money related obligations were not being met.

The study revealed that school development projects had stalled due to lack of funds. A project of fencing the school at Mawilo had come to a standstill because the PTA levy of K10, 000 per parent had been rejected by most parents.

This was common in the other 5 schools visited. The Headteachers also revealed that the free education policy had brought more children back to school but without corresponding incentives for the teachers.

There were few teaching and learning materials, the book pupil ratio still remained at 1 book against 6 pupils in the six schools.

The quality of teaching and learning had been affected,

In Masaiti District, 100% of Headteachers who filled the questionnaire were comfortable with the free education policy. They were happy with the new funding they were able to receive from GRZ. However, 3 teachers (50%) out of 6 were worried about the enlarged class sizes which were becoming too big for teachers to handle.

However, 3 Headteachers (50%) out of 6 in Ndola District revealed that most of the parents with some level of education were not happy about the blanket scrapping of levies in schools.

The Headteachers revealed that parents who were happy about free education were predominantly poor and could not afford the fees.

However, the majority of the elite parents were of the view that the scrapping of fees would impact negatively in the running of schools. It was argued that the school would have poor maintenance, poor sanitary conditions, failure by schools to meet financial obligations and this would ultimately result in poor quality teaching and learning.

4.16.1 Strengths and Weakness of free education policy:

The Headteachers (100%) revealed that the policy had brought back to school the children who had left due to numerous fees. This was a positive sign.

The study showed that schools in Masaiti District were able to receive more funding than before. Initially schools could hardly manage K300, 000 per year as compared to the K2.6 million being received now.

The study found that there was remarkable increase in some school requisites in schools though not adequate. 98% of Headteachers revealed that the free education policy had brought more children back to school but without corresponding incentives for the teachers.

The study further showed that the increase in the number of children was not corresponding to the classroom space. The free education materials were not sent to schools in good time. Schools in some cases had received the free education materials only once, for example, schools in Ndola district.

The study revealed that 98% of Headteachers were of the view that the introduction of free education materials had resulted in parents not contributing to school projects as before.

The Headteachers (90%) disclosed that the pupils could not be sent away from school even when they had only attended a few days in a term. This would mean contravening the policy. Hence, pupils in some cases could come and go away from school at anytime.

4.17.0 Recommendations:

The Headteachers in Masaiti and Ndola Districts recommended that:

- The government should improve conditions of service for teachers as incentives to motivate Headteachers and teachers.
- The government should revisit the free education policy in order to put in place guidelines for identifying vulnerable and poor pupils who could access free education.
- The government should revisit the free education policy by involving other stakeholders so to ensure its success.
- The Headteachers further recommended that for free education to succeed, there was need for the Ministry of Education to release funds and educational materials to schools in good time every term.

4.18.0 Parents Responses:

4.18.1 Awareness of free education policy:

The interview with 18 parents in Masaiti District and 30 parents in Ndola District revealed that they were aware about the free education policy and that it had been implemented in schools specifically for grades 1 – 7. The study found that parents were called to a meeting by the school authority and were informed of the introduction of free education from grades 1 – 7.

4.19.0 Benefits from free education policy:

The interview with the parents in Masaiti and Ndola District disclosed that the returning of orphaned and vulnerable children to school would give them access to education. The parents further revealed that they were able to adequately cater for other children in grades 8 to 12 in terms of school requisites. Furthermore, the study found out that there were less harassments from the PTA

Executive and school Headteachers regarding the many levies that were earlier imposed on them (This was the case in Masaiti and Ndola Districts). The parents in Masaiti District were happy that for the first time, the schools were able to receive between K2.6 million and K3 million per term for education materials which had not been the case before the free education policy.

Hence, with this kind of funds many schools in Masaiti had been able to provide some teaching and learning materials, chalk and football/netball attire for pupils. However, the study in selected schools in Ndola revealed that the Parents Teachers' Associations were not happy about the introduction of free education. This was because the PTA felt that schools would not be able to sustain themselves Vis-à-vis the many utility bills that they had to settle to service providers.

4.20.0 Positives and Negatives of free education:

The study found out that parents were happy with free education. The parents were informed by the PTA Executive Committee regarding the enrolments that had risen in all the selected schools in Masaiti and Ndola Districts. It was revealed that orphaned and vulnerable children were returning to school to continue with their education. Parents interviewed disclosed that there were less reports from their children about harassment by the school authorities regarding non-payment of fees. This had created good relationships between the parents and the school community.

However, in selected schools in Ndola District 24 parents out of 730 parents that is 77.8% were disappointed with the grants that the Ministry of Education was giving to schools.

The study showed that the grants were not adequate enough to meet the school expenses. The six schools visited in Ndola were not able to meet wages for sanitary workers, school guards and other workers who were not government employees. Further, the interview with parents in Ndola showed that the scrapping of fees for grades 1 – 7 would result in parents with children in grades 8 – 9 subsidising more or paying more levies in order to make up for the lost income which had been collected from pupils in grades 1 – 7. Fourteen (14) parents (45%) out of 30 said that the policy would not benefit those parents with children in grades 8 – 12.

The study further showed that 14 parents (45%) out of 30 parents interviewed in Ndola District were of the view that free education policy had not done well and they felt cheated.

This was because, what was promised in the free education policy was not being fulfilled. The same views were expressed by 18 parents interviewed in Masaiti District. It was reported that exercise books, pencils and pens were only given to their children in the first year of free education pronouncements. The interviews therefore showed that parents had continued to buy school requisites for their children.

The study found out that parents were worried about the large enrolments that had occurred with the introduction of free education. This was because there were no corresponding facilities, for example, there were fewer desks for all pupils. The teachers were teaching larger classes hence, they were not able to give individual attention to pupils and that they were having difficulties in carrying out remedial work. This was especially so in the selected schools in Ndola District.

4.21.0 Have parents continued to pay school fees?

The study found out that parents were not paying school fees. This situation was the same in all the selected schools. This was as a result of the abolished school fees and other related fees by the government.

An interview conducted at Simon Mwansa Kapwepwe Basic School in Ndola District brought to the fore the fact that the Parents Teachers' Association was finding it difficult to convince parents to come up with meaningful developmental projects for the school.

The study found out that although the government abolished school fees some parents in selected schools in Masaiti and Ndola Districts were of the view that school fees or project fees be paid by

parents. 24 parents (80%) in Ndola District and 11 parents (62.5%) in Masaiti District were of the view that contributions towards school projects were necessary because the grants the government was giving to schools were not adequate enough to be used on projects. Hence, at Mawilo Basic School in Ndola, the Parents Teachers' Association had resolved to levy every pupil K10,000 (for 2004 – 2005) as contribution towards payments for sanitary workers and guards' wages. Parents were also levied K20,000 for the wall fence project.

Parents in the selected schools disclosed that parents had resolved to find other ways of raising funds for schools in order to meet the high bills being experienced especially in Ndola District.

4.22.0 Recommendations:

The study disclosed that the parents were happy with the free education policy and recommended that it should continue.

A further recommendation was that in addition to the free pupil requisites, orphaned and vulnerable pupils should be given food and clothes at certain intervals of the term.

The parents recommended that teachers' salaries and conditions of service should be improved in order to raise the morale. The government through the Ministry of Education should ensure that pupils requisites and school grants were released in good time in each term.

4.23.0 Pupils Responses:

4.23.1 Awareness of free education:

120 pupils in selected schools in Masaiti and Ndola Districts were aware about the free education policy. Pupils were informed about the policy by the school Headteachers during assembly immediately the schools had received the circular from the Ministry of Education. The pupils further said that the school Headteachers invited their parents to a meeting at which the policy of free education was explained. It was found out that both parents and pupils were happy about this policy.

4.24.0 Benefits from free education:

The study disclosed that pupils in selected schools in Masaiti and Ndola Districts were able to receive school requisites. Pupils in Masaiti received five (5) exercise books each, one (1) pencil, one (1) pen and one (1) ruler. This was immediately after the introduction of the free education policy. Similarly, pupils in Ndola

District received five (5) exercise books each, one (1) pencil, one (1) ruler and one (1) pen each for grades 5 and 7.

Families who had children in grades 8 to 12 were now able to pay for their children in these grades with less difficulties unlike in the past. Parents in most cases had difficulties in raising enough money to pay for various levies demanded by the school authority.

Pupils reported that they were happy to attend school without being harassed for not paying school fees or other corresponding levies. Pupils from Masaiti and Ndola Districts were happy that the policy had benefited the orphans and vulnerable children more especially those in grades 1 – 7.

4.25.0 Negatives about free education policy:

The study disclosed that although the pupils were happy about the introduction of free education policy, 54 pupils from Masaiti District and 41 pupils from Ndola District revealed that their parents and guardians were still buying them exercise books, pens and pencils. The pupils complained that the education materials were not provided for them timely as it had been stated earlier. The pupils disclosed that the school authorities had informed them about the non-arrival of education materials in terms 2 and 3 in 2003.

The situation in 2004 and 2005 had not changed for the better. The pupils had continued to receive exercise books, pens and pencils once per term.

In Ndola District, pupils reported that although the free education policy had allowed more pupils to return to school, there was over enrolment. At Simon Mwansa Kapwepwe School, pupils disclosed that three pupils were sharing a 2 seater desk. The pupils further revealed that their teachers were not able to mark their Mathematics and English exercise books due to the larger numbers. In their view they would not know how they were coping with school work if teachers were not able to check and correct their work.

4.26.0 Were pupils still paying school fees or other levies?

The study found out that pupils in the selected schools in Masaiti District were not paying any kind of fees except at Masaiti Basic School where pupils were paying K1,000 for cobra polish.

Pupils interviewed at Mawilo and Simon Mwansa Kapwepwe Basic Schools disclosed that the school was surcharging each pupil K20,000 for PTA fees and K5,000 for projects.

These fees however, had not been accepted by all parents. It was learnt that parents had written to the office of the District Education Board Secretary for intervention. At the time of the study, the levies were still in force.

4.27.0 Contributions to school projects after free education policy:

60 pupils interviewed in Masaiti District said that they were not contributing towards school projects. These pupils were of the view that the government would not give adequate funds to complete the school projects that the schools had embarked on. 6 pupils at Mawilo Basic School for example revealed that with the introduction of free education policy, pupils had stopped contributing towards the wall fence construction.

The result had been non completion of the wall fence. Similarly, 7 pupils from selected Masaiti District Schools were of the view that parents should contribute towards school projects in order to improve on the school development projects.

4.28.0 Recommendations:

120 pupils from selected schools in Masaiti and Ndola District were very happy with the free education policy. Hence, they were recommending that the government through the Ministry of

Education should include the provision of food and clothes for the orphaned and vulnerable children.

4.29.0 Education Managers Responses:

4.29.1 Views about free education policy:

The interview with Education Managers at Masaiti District, Ndola District, Masaiti DEBS offices, Ndola DEBS office and Ministry of Education Headquarters showed that Ministry officials were happy with the positive changes especially in rural schools where orphans and vulnerable children were returning to school. It was felt that with some positive results being experienced in a number of schools, the government was intending to extend free education to grades 8 to 9. However, top management officials (that is, the Permanent Secretary and 5 Directors) were skeptical about the success of the governments' intention. This was because, in their view, the current free education policy for grades 1 – 7 was facing many teething problems.

Further findings from the district education officials showed that while they agreed with the principle of free education, it was not attainable in the Zambia economy. It was clear that with the introduction of free education policy, the school managers and the DEBS were having difficulties in meeting a lot of financial

obligations related to utility services being offered in schools by individuals and other organisations.

4.30.0 Funding:

The interview revealed that the District Education Board Secretaries in Masaiti and Ndola Districts received funds for free education on behalf of all the schools from the Ministry of Education headquarters. This was expected to be received on quarterly basis. However, at the time of this study, the district had not received any funds for free education. The funding to districts was rather erratic.

The study disclosed that Ndola district was not included in the 2004 Budget Yellow Book hence could not receive any funds for free education materials. The result was that parents were called upon to buy school requisites for their children.

4.31.0 Reactions of Stakeholders to free education policy:

Education Managers reported that they received the pronouncement of free education policy with mixed feelings. This was the feeling expressed by education officials and other stakeholders. Teachers, Teachers Unions and Non-governmental Organisations (NGOs) offering education felt that they were being left out because they were

not consulted on the advantages and disadvantages of free education.

The study further revealed that there was strong opposition from some schools especially the urban schools who had lost a lot of revenue from the various levies that they had been collecting from parents and pupils. It was also reported that the announcement of free education was as a political ploy by the Movement for Multiparty Democracy (MMD) government to counter other opposition parties who had been advocating free education if they came into government.

4.32.0 Difficulties being encountered in implementing the free education policy:

The interview with education managers at district level brought out the factor of too much stress being exerted on the school. Managers were made to solicit for money from the Ministry headquarters in order to help schools in Ndola district for example to settle their bills for electricity and water. The schools that had been collecting over K20 million and above per year in Ndola district were made to receive only K9 million per year. This adversely affected the running of the schools in the district.

The interview further revealed that parents who had children in private schools in Ndola District were willing to pay fees for their children but were not willing to pay in government schools. Further, the study found out that with poor funding and erratic disbursement of funds from headquarters, the district offices in Masaiti and Ndola were finding it difficult to implement the policy. This had resulted in parents providing the education materials to their children instead of the ministry providing for pupils.

Education Managers further revealed that headteachers were no longer in full control of the pupils who stayed away from school and those whose parents willfully withdrew them from school. The Education Managers reported that pupils were now allowed to return to school anytime they felt like and that the school authorities would not send these pupils away. This would be taken as going against the circular on free education.

4.33.0 Was there consultation before the introduction of free education?

The interview with Ministry officials at all levels reported that the government announcement of free education in March 2002 was made without consultations with other stakeholders.

Further, the announcement of free education was done without the would-be-implementators being prepared adequately to deal with various issues regarding free education. Ministry officials at all levels said that the pronouncement was done by the Republican President and no one would have challenged a presidential decree.

4.34.0 Strengths and Weakness of free education:

The interviews revealed that schools in Mašaiti District were able to receive adequate funding for their running costs as compared to 2000 and 2002 February when the schools could raise less than K400,000 per year. It was revealed that the most vulnerable pupils and orphans were able to go to school without being sent away for non-payment of school fees. There was an increase in the school enrolments especially in selected schools (Masaiti, Fiwale and Simon Mwansa Kapwepwe Basic Schools). The education managers were of the view that with this kind of enrolments, Zambia would, hence achieve the Education For All goals.

However, the study found out that introduction of free education had deprived schools (especially in Ndola District) the much needed income from the levies. The education managers argued

that there were no corresponding funds to cushion the school's budgets. Similarly, the school over-enrolments could not correspond to limited furniture, teaching and learning materials and teaching staff. The selected schools in Masaiti were poorly staffed, resulting in teachers being over worked by the triple sessions.

The introduction of free education was seen to disempower the parents who were ready to pay for their children's education. Thus parents in Masaiti's selected schools and Ndola's selected schools were not willing to contribute to the school developmental programmes.

4.35.0 Recommendations:

The education managers recommended that:

- the government should revisit the policy and prepare guidelines for the implementation of the free education policy.
- the government should hold further consultations on free education, since the Ministry had identified problems in the implementation of the policy.

- the education managers further recommended that the government should provide incentives to teachers who were teaching triple sessions as a result of the big enrolments that had occurred after the introduction of free education.

CHAPTER FIVE

5.0 DISCUSSIONS:

5.1.0 Respondents' Interpretation of free education:

The concept of free education policy was interpreted in almost a similar way in Masaiti and Ndola Urban Districts during the interviews. Some respondents reported that free education meant that learners would attend school at any level without paying any form of tuition or School fees. This interpretation was similar to *Wikapedia free encyclopedia* (2005), which defines public free education as a policy stance in politics that ensures education for its citizens up to a certain level. The other respondents understood free education as education that was provided at no cost for learners.

5.2.0 Enrolments:

Literature review has shown that prior to independence, there were 13,666 pupils at primary school level and 52,666 at secondary level (Kelly: 1999). The study further revealed that after independence, there were 23,300 girls and 86,900 boys at grades 1 -4 and 28,500 boys and 4,200 girls at grades 1-4 (UN/ECA/FAO: 1964).

The study however, revealed that during the late 1970s, 1980s and late 1990s the Zambian economy affected the social sector and education and health suffered the most.

Hence the government could not provide adequate resources to run the education sector. Therefore, schools had to find ways and means of running education. The introduction of the Social Adjustment Programme (SAP) in the 1980s led to the re-introduction of boarding and examination fees in secondary schools (Kelly: 1999).

Further, a number of fees were also introduced in primary schools. The study therefore revealed that parents paid a number of fees or levies before the introduction of the free education policy. The fees consisted of those for Preventive Maintenance, PTA levy, Stationery fees, School Statutory fees and User fees among the many. These high fees in Masaiti and Ndola sent 22% of pupils away from schools. These fees could not be met by parents because of the poverty levels in various households. This study is similar to Kasonde – Ngandu et al (2000), Milimo (2000), and Sikwibele (2003) who alluded to the many fees that pupils had to pay. Kasonde – Ngandu et al (2000) found that pupils and parents were expected to contribute to teachers' farewell events and other teacher's functions. The end result was that many pupils stayed away because they could not afford to pay. This naturally affected enrolments in schools.

Jimenary (1987), Bidsall and Orivel (1996) and Weir (2000) in their studies on enrolments had noted that the high school fees levied against

parents and children had adversely affected school enrolments. Many parents due to poverty at the household level decided to make ends meet than sending their children to school.

The study for example, noted that the Education Act of 1966 was aimed at allowing all school going age children to attend school, hence improve on and maintain good enrolments of children in schools. Further the study revealed the increases in the school enrolments in grades 1 – 7 was in line with the World Conference in Education, that is Education For All, EFA (1990), and the declaration of education as one of the fundamental Human Rights and it should be free and compulsory, (UN: 1948).

Hence, it is important to note that further review of documents in the Ministry of Education headquarters revealed that there were 6,786 government schools with a total of 2,522,378 pupils in 2004 in grades 1 – 7 with 48.3% being girls. This gave a growth of 10.3% in enrolments between 2002 and 2004 (MOE: 2005).

Further, the review revealed that in 2005, there was 87.7% Gross Enrolment Ratio for boys and 84.1% for girls while the Gross Enrolment Rate (GER) was 93.1% for boys and 89.8%. This gave a significant variance in the gross enrolment rates for boys and girls in 2004 (MOE: 2005).

The school enrolments have brought out various effects in the provision of education on teachers, school managers, pupils, parents, infrastructure, and on government resources.

5.3.0 The effect of Free Education Policy on Teachers:

The study revealed that teachers received the introduction of free education policy with mixed feelings. While accepting that this policy would bring back the children who had left schools due to fees, they were worried about the classroom space which would accommodate more children. There were inadequate teaching and learning materials. Further, the PRP methodology was going to be difficult to use due to a large number of Grades 1 – 4 pupils. The teachers also revealed that the time for triple sessions was not enough to give good tuition to pupils, hence teachers' attention towards pupils would be reduced due to teacher shortages in schools; and the small number of teachers available would be over worked.

The study revealed that the classroom performance had been affected. This finding is similar in some ways to Mtegha (2003) who found that schools in Malawi had become over crowded, poorly staffed, teaching and learning materials and other school facilities were not available and adequate.

The study revealed that teachers were finding it difficult in most cases especially in Ndola schools to cope with the large classes. They were not motivated enough to handle over-enrolled classes, with inadequate teaching and learning materials.

5.4.0 Effects of free education on pupils

The study revealed that pupils were aware of the Free Education Policy (FEP) and were happy about it. They revealed that it was a good initiative because it had helped many households to send their children back to school, especially the orphans, vulnerable and children in difficult circumstances.

Pupils interviewed wished that the government could include the provision of food and clothes for the poor children. It was disclosed that some pupils could not come to school due to lack of food and clothes. Kasonde – Ngandu et al (2000), Milimo et al (2000), Jimenez (1987) in their study in Zambia and Mali revealed a number of factors that hindered larger numbers of children from attending school among which poverty stood out as a major problem in various households.

This level of understanding by pupils in terms of poverty in the households agrees with what Jimenary (1987), Bridstall and Orivel (1996) and Weir (2000) in their studies on enrolments had noted that the high school fees levied against parents and children

had adversely affected the school enrolments. Due to poverty at the household level, many parents and children decided to make ends meet rather than sending their children to school.

5.5.0 Effects of free education on the parents:

The study revealed that with the introduction of free education a good relationship between parents, teachers and school administrators had emerged. The teachers and school administrators no longer sent away children from school for non-payment of school fees or other levies. This kind of relationship was not in Zambia only, but in other countries where free education was introduced. For example, the introduction of free education in Uganda was overwhelming and parents were happy that their children would never be kicked out of school. (*Wambui Mwangi of the Kenya Times: 2003*).

Some views of parents on the introduction of the free education policy were positive while others were negative. Generally, the study found that parents were of the view that children had a right to education and that the introduction of free education in schools would encourage parents to send their children to school. International evidence also indicates that education was viewed as a Fundamental Human Right.

According to UN, 1948, Article 26, the nations of the world in 1948 declared that elementary education would be free and compulsory and that higher levels of education would be accessible to all on the basis of merit. Further, evidence indicates that countries such as Malawi, Kenya, Lesotho and Uganda had introduced free education (UNESCO: 2004)

The study revealed that parents were aware that learners received free exercise books, pencils, pens and rulers, but free education materials were not given regularly and this had made them begin to question the introduction of free education. Parents questioned whether their children would go beyond Grade 7 if the government continued not to provide free education materials as earlier promised. According to Bishop J. (1989), schooling is one of several important contributors to the skills of an individual and to human capital. Any noticeable effects of the schooling on the contribution of skills and income will become apparent some years in future with the provision of free education materials for use in the teaching and learning process.

The study revealed that in Masaiti and Ndola Districts it was becoming difficult for schools to provide for teaching/learning materials because the Ministry of Education was unable to provide grants in good time.

The free basic education policy had allowed a number of children to go back to school hence the materials being provided were not inadequate enough to provide meaningful teaching/learning in schools. The study revealed that the government probably did not recognize the many implications of reducing the cost of education to parents. For example Malawi which has introduced free education faced problems of financing the free education programme, Mtegha (2003). The result of poor financing of free education has resulted into significant decline in the quality of education.

This study agrees with Graham–Brown (1996) who stated that governments in developing countries that might aim to provide free education were likely to face problems of financing and upholding the quality of education. The failure by the Ministry of Education to provide the free education materials like chalk, textbooks and desks do agree with Graham–Brown (1996) who further stated that even in countries where primary education had not been declared free, inadequate resources in the education system had negative effects on the quality in terms of inputs and outputs.

Worth noting in this study is that parents were able to pay for their children who were in grades 8 – 12. The fees which had been paid at grades 1 – 7 were now shifted to other grades.

5.6.0 Effects of free education policy on schools:

The study revealed that in some schools projects had stopped or were being done on a small scale due to lack of money.

It was noted that before the introduction of the free education policy, schools used to net over K20 million per year and as such various school projects were undertaken. The level and type of fees imposed on pupils and parents varied from school to school. A study by Tomasevki (2003) and the World Bank (2002) undertaken across seventy nine countries showed that seventy seven of them had at least one kind of fee at primary level. The most prevalent fee was Parents Teachers Association Levy or Community contributions charged over 70%, Zambia inclusive. It was these levies that had led to poor enrolments in schools because those who could not afford to pay were sent away. An earlier study by Kasonde – Ngandu et al (2000) also found that as a result of cost sharing the school administrators were demanding too much money from parents and pupils. The study by Kasonde-Ngandu et al (200) also found that 78% of parents and 12% pupils in Ndola Urban were of the view that parents should contribute towards projects if schools had to develop.

The study revealed that with the increased enrolments in the selected schools, there was great demand for classroom space and teaching and learning

materials. Mwansa et al (2004) noted that the Ministry of Education was continuously trying to rehabilitate and construct schools so as to increase or access. There was a noted increase in the grant allocations to schools as a way of improving on the provision of services and other teaching and learning materials.

5.7.0 The effect of free education policy on School Managers (Headteachers):

The study found out that School Managers in Masaiti and Ndola Urban district had accepted and were implementing the policy. However, the School Managers in Ndola Urban expressed dissatisfaction because of the reduced revenue which had made their work difficult. They had found themselves with debts to clear regarding utility services that had already been offered by various agencies. They were not able to pay workers not employed by the government. They were also faced with the large numbers of pupils in classes. Due to over enrolments, the School Managers had the big task of convincing teachers to handle triple sessions, convince the District Education Board to provide desks and teaching/learning materials. In most cases, the District Education Board had tried to meet the school demands but not to their expectations. The school development plans had been thrown into disarray as a result of free education.

The study further found that the School Managers were not ready at the time the FEP was introduced. This could be attributed probably to the fact that the government did not consider the costs and logistical challenges involved in delivering free education.

The African Women Magazine (2003) showed that enrolment in countries that had declared free education jumped from 2.7 million to 7.5 million. This was such a large number that schools were not able to cope with it. In a similar manner the study revealed that large numbers were making work difficult for School Managers who had to make do with the little they were able to get in form of grants. School Managers have had their own battles with Provincial Education Officers over extra levies despite the circular on free education. The School Managers continue arguing that the Ministry of Education had not set aside funds to complete the projects that were initiated by parents.

5.8.0 Grants:

The study showed that despite the introduction of free education, schools were not able to get the grants though small in good time. Meki (2004), Sikwibele (2003) and Mwansa et al (2003) in their studies acknowledged poor and inadequate funding to schools by the government. The result of inadequate funding had resulted in schools such as Mawilo Basic School to start levying parents and children towards wall fence projects and PTA funds. This finding was similar to what happened to schools in Kenya.

According to findings by the *Pembesika News* (2004), a study commissioned by Kenyan Government revealed that the District Education Boards were forcing the parents to finance what they called "Mysterious Programmes", hence in this vein they conceded that education was after all not free.

The study discovered that schools in Ndola Urban district had been able to raise over K20 million per year while schools in Masaiti had been able to raise only close to K300,000 per year.

Schools in Ndola Urban had been able to pay for utility services without a lot of problems. However, schools in Masaiti district though not big in status had been struggling even to meet demands or for paying certain services or procure school requisites for administrative purposes.

The study discovered that with the introduction of free education, schools in Ndola lost out of the revenue which they used to accrue before 2002 while Schools in Masaiti were happy that for the first time the schools were able to receive K2.6 million for grade 3 Basic Schools and K3 million for grade 1 Basic Schools.

The study findings were similar to Meki (2004), who found that grants though provided to schools were not adequate enough especially for most urban and big schools to pay for utility bills. Similarly, findings by Kelly M.J. (1991) and Lungwangwa (1994) stated that due to reduced funding to

primary schools, the level of teaching/learning materials and payment for utility services had reduced so drastically as far back as 1986.

The study also found that in Zambia various donors or partners and agencies provided over 50% of funds to education. For example various agencies in Zambia covered 27% of total expenditure in 2000, approximately 50% of basic education (Colclough et al: 2003)

Grants to Masaiti district as annual provisions in 2004 were K154, 371,000 but the total release to the district was K131, 443,000 from the Ministry of Education headquarters giving a total variance of K22, 928,000. Similarly, grants for Ndola District in 2004 were K587, 007,000 but the total release was K40, 000,000 giving a total variance of K547, 007,000.

In 2005 Masaiti District, received K31, 276,000 from the total annual provision of K93, 831,000. Ndola District from a total provision of K242,638,000 in 2005 only received K6,522,000 for the whole year 2005 (MOE: 2005). This was because Ndola District was not reflected in the Government Yellow Budget Book.

5.9.0 Effects of free education on the Ministry of Education:

The study revealed that the introduction of FE came as a surprise to them because they had not been consulted so as to help in the planning and effective implementation. The officials received the circular dictating what was to be implemented without questions.

This was because it was a Presidential decree (MOE: 2002). The decree though welcome in some quarters was faced with a number of criticisms from a cross section of people. Meki (2003) had talked of the implications of free education which the government had not taken into consideration. However, the study by Meki (2004) also disclosed that the officials were happy with the return to schools of OVC and other children who had left school as a result of various fees.

However, this study agreed with a World Bank Representative, Lawrence Clarke's caution that the initiative to abolish school fees needed to be well planned to avoid backlash in the education system. One such example of backlash was the omission of Ndola District Education Board in the 2004 Budget Yellow Book. The implications were that the schools in Ndola would not benefit from the free education materials. Further it was revealed that the shifting of funds from other sectors of education in the Ministry affected other sections especially the Directorate of Open and Distance learning.

The study revealed that cooperating partners had confirmed to give more money to the Ministry of Education but the capacity to utilize this money had been low hence, funds meant for schools for free education were sent late. The capacity in the Ministry of Education at district level to handle funds equally affected the flow of funds for free education. Funds could only be released to districts upon retiring the previous funds. The study therefore shows that the control systems within the Ministry of Education were strong in this regard (MOE: 2005).

CHAPTER SIX

6.0 CONCLUSION AND RECOMMENDATIONS:

6.1.0 Conclusion

The study being concluded now revealed that parents, teachers, Headteachers, pupils and Ministry of Education officials in Masaiti and Ndola Urban Districts had accepted the introduction of the free education policy in Lower and Middle Basic Schools (Grades 1 – 7). This was because the policy was meant to bring back to school many children who had stopped school due to the many levies or fees that schools were charging. The most affected of these children were the girls, orphans, vulnerable and children in difficult circumstances. The study had revealed that there was an increase in class enrolments in Grades 1 – 7 as a result of this policy.

The study also revealed that while schools accepted the introduction of free education policy to a certain extent, the majority of urban schools were not happy because the revenue that had been collected every term had been reduced drastically and making it difficult for the schools to pay utility services.

Factors that were found to be impeding negatively included, the late delivery of free education materials leading to pupils receiving exercise books, pencils, pens once in a year or none at all.

The small grants to big schools had made it difficult to complete school projects. There was also negative attitudes by some parents who were not willing in anyway to assist the schools as a result of the free education policy.

The large classes in Grades 1 – 7 had lead to over utilization of facilities resulting in damage to these facilities, hence maintenance of such had become a problem in some schools. Similarly, due to lack of class furniture, a good number of children were learning while seated on the floor. The large classes had increased the pupil/teacher ratio and the end result had been poor classroom performance.

The findings of this study revealed that the introduction of free education policy was received with mixed feelings and views. It was important that radical planning and consultations of various stakeholders about FE should have taken place earlier before implementation.

6.2.0 RECOMMENDATIONS:

6.2.1 The recommendations are based on the findings and conclusions discussed. The following recommendations have been made to the government of the Republic of Zambia and the Ministry of Education Policy makers to act upon:

- The government should increase free education grants to schools;
- The government through the Ministry of Finance and National Planning should release the grants to the schools in good time for the Schools to execute their activities in good time;
- The Ministry of Education should release grants and free education materials to Districts and Schools every term;
- The government should provide incentives in terms of care loans, household loans, sponsorship to colleges and Universities to motivate teachers and Headteachers handling large classes as a result of free education at grades 1 – 7 level.

6.2.0 POLICY:

- The Ministry of Education should allow schools to levy parents certain fees especially in urban areas where some parents were capable of paying;
- The Ministry of Education should revisit the FEP in order to come up with clearer policy guidelines;
- Policy revisions and FEP guidelines and all political statements should be harmonized so that there are no inconsistencies in the implementation of the FEP;
- The Ministry to continue to provide for and rehabilitate schools in order to cater for increased school enrolments.

6.4.0 Future Research:

This study focused on the effects of free education policy in Ndola Urban and Masaiti districts. The study has raised a number of issues which may attract future research.

6.5.0 The following broad research areas could be conducted in future:

- Re-introduction of free education in Grades 1 – 9 in the Zambian economy.
- Re-introduction of free education in grades 10 – 12 in the Zambia economy.

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