

THE EFFECTS OF THE 'FREE EDUCATION'  
POLICY ON ACCESS AND EQUITY IN SELECTED  
BASIC SCHOOLS OF LUSAKA AND CHONGWE DISTRICTS

BY

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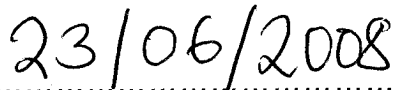


## DECLARATION

I, Samwami Elizabeth Nyemba hereby declare that this dissertation represents my own work and that it has not been previously submitted for a degree at this or any other University.



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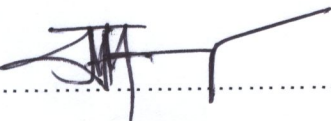
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This dissertation by Samwami Elizabeth Nyemba is approved as fulfilling part of the requirements for the award of the degree of Master of Education in Educational Administration by the University of Zambia.

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## **DEDICATION**

This work is dedicated to my two daughters and son; Mulima, Muyunda and Nyambe.

## **ACKNOWLEDGEMENTS**

This work is not a personal undertaking. It is the consummation of research work undertaken over a period of one year five months. As a result of this research, I was fortunate to make the professional acquaintance of a number of academicians and professionals whose competencies in the subject of this study remain most invaluable.

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Finally, I thank my husband, Mr. Evans M Nyambe for the tolerance and endurance during my long absence from home when I was supposed to do maternal duties. To those mentioned above and those not mentioned, please acknowledge this token of my gratitude.

## **ACRONYMS**

<b>AIDS</b>	-	<b>Acquired Immuno – Deficiency Syndrome</b>
<b>BESSIP</b>	-	<b>Basic Education Sub-Sector Investment Programme</b>
<b>CHANGES</b>	-	<b>Community Health and Nutrition, Gender and Education Support -2</b>
<b>DEBS</b>	-	<b>District Education Board Secretary</b>
<b>EFA</b>	-	<b>Education for All</b>
<b>FAWEZA</b>	-	<b>Forum for Women Educationalists of Zambia</b>
<b>HIV</b>	-	<b>Human Immuno – Deficiency Virus</b>
<b>MDGs</b>	-	<b>Millennium Development Goals</b>
<b>MoE</b>	-	<b>Ministry of Education</b>
<b>NGO</b>	-	<b>Non-Governmental Organization</b>
<b>OVCs</b>	-	<b>Orphans and Vulnerable Children</b>
<b>PTA</b>	-	<b>Parent – Teacher Association</b>
<b>SHN</b>	-	<b>School Health and Nutrition</b>
<b>UPE</b>	-	<b>Universal Primary Education</b>
<b>UDHR</b>	-	<b>Universal Declaration of Human Right</b>
<b>UN</b>	-	<b>United Nations</b>
<b>UNICEF</b>	-	<b>United Nations International Children Emergence Fund</b>
<b>USAID</b>	-	<b>United States Agency for International Development</b>
<b>WFP</b>	-	<b>World Food Programme</b>
<b>YWCA</b>	-	<b>Young Women’s Christian Association</b>



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## **CHAPTER ONE**

### **INTRODUCTION**

#### **1.1 BACKGROUND**

In 2002, the Republican President announced the introduction of the free education policy at the levels of Grades 1 to 7. The Presidential decree on free education was precipitated by the unprecedented declining enrolment rates, increasing dropout rates and unequal access at the Middle Basic level of Grades 1 to 7, since the mid 1980s when cost-sharing measures in educational provision were effected. Disadvantaged parents failed to meet school costs for their children. Hence, access and equity in educational provision were negatively affected.

Prior to the abolition of the payment of user fees in the basic education sector of Grades 1 to 7 in February 2002, there was evidence to show that there had been a decline in access and equity. The cost-sharing measures which called for parents' contribution towards education impacted negatively on the Orphans and Vulnerable Children (OVCs) who were failing to enter while those who were already in the system were dropping out. The negative impact on equity was evidenced in rural settings where girls' participation was reported to have dropped (Kelly, 1999:350).

The Ministry of Education (MoE) statistical evidence acknowledges the decline in access and equity with regards to enrolment, completion and dropout rates at the primary school level (Grades 1 to 7) of the education system.



On the overall, only 79% Grade 1 entrants in 1988 reached Grade 7 in 1994 while the 1988 -1994 completion rate for girls was 71.4% compared with 86.9% for boys (MoE, 1996:15-17).

The foregoing concerns among others led the Government to introduce free education at Grades 1 to 7 to address the declining enrolment and increasing dropout rates which had characterized the education system. The contents of the “free education” policy announced by the Republican President were sent to all the main stakeholders in the education system. These included, among others, Heads of Schools, PTA Chairpersons and District Education Board Secretaries (DEBS). The Ministry of Education (Circular No. 3,2002) states:

*“The announcement should be seen in the context of unprecedented declining enrolment rates and increasing dropout rates even after three years of BESSIP whose objectives are to increase enrolment and improve learning achievements.”*

The Ministry of Education reacted to the Presidential ‘decree’ on the introduction of free education (at Grades 1 to 7) by putting in place measures which re-enforced the achievement of the “free education” policy. The measures included among others giving sector pool and free education funds to basic schools and the provision of

infrastructure and learning materials in basic education from Grades 1 to 7 (MoE, 2003:11).

In addition, Head Teachers of Basic Schools were directed to adhere to observations intended to make the “free education” policy work. The observations included among others stopping to charge pupils at Grades 1 to 7 any kind of fees and the wearing of school uniforms not to be compulsory (MoE, Circular No. 3,2002).

The measures embodied in the “free education” policy endeavored to re-enforce the implementation of the policy under review. The “free education” policy tried to address access and equity in enrolment and increase in dropout rates at the levels of Grades 1 to 7. The MoE (2003:11) observes:

*“These measures are likely to bring a substantial increase in enrolment (71%) in Basic Schools and to reduce the percentage (29%) of the out-of-school children.”*

## **1.2 STATEMENT OF THE PROBLEM**

The “free education” policy and other back up measures were introduced in 2002 because there had been decline in access and equity in the Middle Basic level from Grades 1 to 7. The economically disadvantaged parents in some communities failed to pay PTA user fees and other school costs for their children. Consequently, the children were not allowed to start schooling while those who were already in school dropped out. Hence, the Government abolished school fees and other school requirements in the level of the education system under review in 2002.

### **1.3 PURPOSE OF THE STUDY**

The study tried to investigate the contribution of the “free education” policy to increasing access and promoting equity in educational provision in the Lower and Middle Basic Education, Grades 1 to 7.

### **1.4 OBJECTIVES**

The following were the objectives of the study:-

- (i) To find out the number of Orphans and Vulnerable Children who were in Grades 1 to 7 from 2001 to 2005 in the basic schools under study.
- (ii) To determine whether the “free education” policy was increasing access in Middle Basic Schools of Grades 1 to 7 between 2001 and 2005.
- (iii) To establish whether additional infrastructure had been provided in the Middle Basic Schools of Grades 1 to 7 between 2001 and 2005.
- (iv) To establish the availability of the free education and sector pool funds disbursed to Middle Basic Schools (Grades 1 to 7) between 2001 and 2005.

## **1.5 RESEARCH QUESTIONS**

- (i) What was the total enrolment by gender of the Orphans and Vulnerable Children in the Middle Basic Schools between 2001 and 2005?
- (ii) What was the total enrolment by gender of pupils in Middle Basic Schools between 2001 and 2005?
- (iii) What was the number of classroom blocks built in the Basic Schools between 2001 and 2005?
- (iv) What was the total amount of the free education and sector pool funds disbursed to basic schools between 2001 and 2005?

## **1.6 SIGNIFICANCE OF THE STUDY**

This study would help the Government in its administration of Basic Education. The recommendations of the study would aim to increase the participation of Orphans and Vulnerable Children in education at the Basic School level.

**1.7 LIMITATIONS OF THE STUDY**

Inadequate fiscal and time resources limited the study to three basic schools each in the Lusaka and Chongwe districts. The study could have been extended to ten schools in each district if financial resources and time could allow.

**1.8 DEFINITION OF TERMS**

- Access - refers to the extent to which education is being accessed by the general eligible population at a given education entrance level.
- Basic School - refers to an educational Institution providing education to pupils from grades 1 to 9 level of the education system.
- Cost-sharing - refers to financing of education on partnership basis between the government and the parents.
- Disparity - refers to difference; inequality discrepancy; gap; disproportion; inconsistency.
- Dropout Rate - refers to the proportion of pupils who leave the education system without completing a given school year.

Effects	- refers to changes that have taken place in the lower and middle basic, Grades 1 to 7 after the introduction of the free education.
Equitable	- refers to even- handed; fair reasonable, impartial; just unbiased.
Equity	- refers to a an intervention put in place to assist the vulnerable children in accessing quality education.
Fundamental	- refers to foundation; base; very important basic principle.
Impede	- refers to block or make action difficult.
Impediment	- refers to a hindrance or obstruction.
School Manager	- refers to a Head of a Basic or a High School.
User fees	- refers to the money the middle basic school used to levy pupils as a cost sharing measure.

## **1.9 SUMMARY**

This chapter focused on background information, statement of the problem, the purpose of the study, the objectives of the study, research questions, significance of the study, limitations of the study and the definition of terms.

In chapter two, the researcher describes the literature review related to the study.

Many governments worldwide which appended their signatures to the documents at International Conferences such as World Declaration on Education for All (EFA) in 1990 in Jomtien, Thailand, and the World Education Forum in 2000 in Dakar, Senegal, have advocated for the achievement of the Universal Primary Education (UPE) and free education at elementary and primary education levels in their respective countries (Federal Ministry of Education, Nigeria: 1992).

Research findings on returns to an individual and society resulting from investing in primary education are supplementing the call for the implementation of the Article 26 of UDHR on children's right to education. Hence some countries, especially the developing ones, were attempting under severe economic problems to universalize access at primary education level through abolishing tuition fees and other school costs. Primary education was recognized to be the foundation of all other levels of the education system. Further, primary education does not only improve the lives of children and their families, but contributes to the economic growth of their country ([www.doi.gov/ilab](http://www.doi.gov/ilab)).

The UN agencies, among them the United Nations International Children's Emergence Fund (UNICEF), the United Nations Educational Scientific and Cultural Organisation (UNESCO) and the United Nations Development Programme (UNDP) sponsored the World Conference on Education for All (W.C.E.FA) in March 1990 in Jomtien, Thailand. One of the Conference agenda items among others was the revisiting of Article 26 of the UN Charter on the UDHR on the children's right to education through the provision of free and compulsory basic education.



The governments and participants to the Jomtien W.C.E.F.A committed themselves to a ten year target in which to achieve the goal, "Universal access to, and completion of primary education" in their respective countries by the year 2000 (W.C.E.F.A; 1990)

The World Education Forum which was held in 2000 in Daka, Senegal, was a follow up to the Jomtien decade set goals, one of which was to "achieve Universal Primary Education (UPE) and free and compulsory primary education. The heads of state and governments at the Dakar forum renewed their commitment towards addressing the decline in enrolment and increasing dropout rates in their respective countries. The Dakar Conference targets enhanced the second millennium development goals (MDGS) which embraced primary education, so as to "achieve universal primary education by 2015" (<http://portal.unesco.org/education/en/ev.php>).

The foregoing MDG is targeting children everywhere in the world, boys and girls alike, to be able to complete a full course of primary education by 2015. Some statistical data indicated that more than 100 million children in the world were not in school and that the majority were in Sub-Saharan Africa and South Asia.

Further, these countries were at the greatest disadvantage in receiving access to education at the primary school age (<http://en.wikipedia.org/wiki/universal-primary-education>). Despite the economic crisis faced in many countries, the campaign towards Universal Primary Education was scoring some success in these countries.

Some governments were putting in place interventions which were aiming at increasing access to primary education by addressing factors impinging on access, retention and equity in their endeavour to achieving Universal Primary Education. They addressed decline in enrolment and increase in dropout rates by compensating poor families for the loss of income that resulted when children went to school instead of working.

Various types of economic incentives which included free school meals, access to micro credit, and the waiver of school fees were used. For example, Bangladesh, implemented a Food for Education Programme at which more than 1.46 million children from about 1.14 million families benefited from, in 1996. The programme was reported to have significantly increased enrollment and attendance and reduced drop out rates at the primary level ([http://www. dol. gov/ilab](http://www.dol.gov/ilab)).

Botswana is yet another country which is reported to have achieved universal access to primary education and gender equity in formal education. These were made possible by the government's political will by substantially investing in basic education, defined as "10 years of schooling" enhanced by rapidly expanding both infrastructure and services. The country put in place national and educational policies intended to reinforce compulsory primary education. (<http://www.scarpn.org.za>).

The Botswana government's stance of making the education sector the single largest expenditure item in its fiscal budget averaging more than a fifth of the budget was attributed to its achieving universal access to primary education and gender equity.

It is reported that in 2003, education accounted for 24 percent of the total fiscal spending, up from 22 percent in 1981 and 29 percent of the recurrent expenditure (<http://www.scarpn.org.za>).

Other countries which used the “abolishing primary fees” factor in their request to increase enrolment and reduce dropout rates succeeded in increasing enrolment at the primary education level. These countries which include Indonesia, Kenya and Tanzania, increased their enrolments significantly after they abolished primary fees (World Bank, 1995)

## **2.3 THE ZAMBIAN SITUATION**

Zambia, like any other country in the world which has ratified international conventions and declarations, recognizes the Rights of the Child and the Universal Declaration on Human Rights, among others. It also recognizes the important role primary education plays in the social, economic and national development. Primary education is reported to be the only formal education that the majority of the young people receive and serves as a basis on which all further education and training must be built (MoE; 1996).

Zambia's education system in 1964 had concerns with regard to access and equity. The number of school places which were available for Grade 1 entrants was quite small compared to the number of children who were supposed to begin school the same year (1964).

Out of over 100 000 children who were supposed to begin schooling in January 1964 only 72 000 entered Grade 1. This number represented 70 per cent of the children who had reached school going age (Mwanakatwe; 1964).

In 1973, the Zambian economy entered a period of serious decline following a major fall in the price of its main export then, copper, and the subsequent loss of revenue. Also oil prices went up.

The government was confronted with high ongoing costs of the educational expansion it had initiated and that was compounded by a rapidly increasing population. In 1968, the country's population was approximately 3.5 million and had been growing at about 2.6 per cent since 1963. This rapid population increase continued. It made the full implementation of the universal access to primary education more difficult than it had been anticipated. Consequently, many Grade 1 entrants were not enrolled due to a number of factors, one of which was inadequate infrastructure (Camody, 2004)

Zambia's economy was not doing well in the mid 1980s for the government to have continued subsidizing the education sector. Hence, the government's adoption of the Structural Adjustment Programme (SAP) conditionalities which unfortunately impacted negatively on the enrolment at the primary school level, (Grades 1 to 7) of the education system. The decline in enrolment was among others due to the cost – sharing measures which were precipitated by SAP Kelly (1999:350) acknowledges that there was, "decline in primary school gross enrolment ratio from 95 per cent in 1985 to 85 per cent in 1994".

The cost-sharing measures subjected all parents and guardians to contributing towards the education of their children and wards respectively by paying Parent – Teacher Association (PTA) Funds, school fund (SF) and other school levies. To this effect MoE (1996:25) states:

*“Parental and community responsibility for running  
and developmental costs of basic schools will be met  
through the school fund, PTA levies, stationery payments...”*

The cost sharing measures impacted negatively on the economically disadvantaged parents. Pupils whose parents failed to meet payments for the tuition fees and other levies demanded by the Heads of schools were not allowed to attend school. The Grade 1 entrants whose parents did not meet the tuition fees and other requirements such as a ream of paper and toilet rolls were not admitted in school. Research findings indicate that the number of eligible children who were supposed to start Grade 1 was declining while the dropout number of pupils leaving school before completing Grade 7 was increasing (Kelly, 1999).

The Zambian government's quest to address the declining enrolment and increasing dropout rates at the primary level of the education system led to the formation of the Basic Education Sub- Sector Investment Programme (BESSIP). The enrolments in the lower and middle basic levels were reported to have either declined or were static between 1994 and 1999. The BESSIP was therefore formulated so that concerns pertaining to decline in enrolments and increase in dropout rates were to be addressed. MoE (2005: 5) reports:

*"During this period the annual school enrolment rate was low, stagnant and appreciably lower than the population growth rate of school age going population."*

The BESSIP activities were funded by the Zambian government and co- operating partners. The programme ran from 1999 to 2002. It is reported to have scored success in access and equity in basic education, Grades 1 to 7. The BESSIP funds tackled the immediate issues of access and equity in the level of education in question.

The BESSIP operations came to an end in 2002. The same year, in February 2002, the Government in its quest to meet one of the goals in the National Educational Policy Document, **Educating Our Future** in particular, attainment of universal lower and middle basic education (Grades 1 – 7 by 2005) declared the "free middle basic education "policy at Grades 1 to 7.

The policy abolished payment of all user fees. Some measures backing up the policy included among others, wearing of uniform not compulsory, (MoE: 2003). Following the presidential decree on the introduction of free education, the Permanent Secretary, Ministry of Education, sent a circular to all the main stake holders in the education delivery. The circular No 3, 2002, dated 15<sup>th</sup> March 2002 reads:

*"The announcement should be seen in the context of unprecedented declining rates and increasing dropout rates even after three years of BESSIP whose objectives are to increase enrolment ..."*

It is now six years (2002-2008) from the time the 'free education' policy was declared. The government is obliged to provide every child of school going age access to primary education. This is in line with the importance the government puts on the role primary education plays in national development, in terms of private and social returns. It was hoped that the policy would achieve its intended goals of bringing on board all eligible children, boys and girls, alike and retaining those who were in the system until they completed Grade 7.

## **2.4 SUMMARY**

The chapter discussed **Literature Review** at the International and Zambian situations related to the study.

In chapter three the researcher would describe research design and target population among the **Research Methodology**.

## **CHAPTER THREE**

### **RESEARCH METHODOLOGY**

#### **3.1 INTRODUCTION**

This chapter presents research design, target population, study sample, data collection and data analysis among other **Research Methodology** of the study.

#### **3.2 RESEARCH DESIGN**

This study employed a survey design to collect data pertaining to the problem under review. A survey design is one of the descriptive research methodologies. It employs a variety of instruments and methods to study effects and comparisons among other things. Quantitative and qualitative techniques were employed to collect and analyse data.

A survey was used because it was easy to conduct and data was sourced from many subjects. It was also used due to its degree of subjectivity and biasness. However, it was expensive due to the transport and the materials production costs which were incurred.



### **3.3 TARGET POPULATION**

The population studied comprised all the District Education officials, School Management and Parents - Teachers Association Executive members in Lusaka and Chongwe District Education Boards. The researcher chose the two districts, Lusaka (urban) and Chongwe (rural) because they were representative of Lusaka Province which is comprised of four districts.

### **3.4 STUDY SAMPLE**

The total study sample comprised 100 respondents divided into the following:-

- 40 members of School Management
- 50 Parent Teacher Association (PTA) Executive members
- 10 Officials at Lusaka and Chongwe District Education Board Offices

The simple random sampling procedure was used to select the respondents. The Lottery methodology was employed. The researcher chose simple random sampling because it is one of the sampling procedures commonly used in educational research. Further more, random sampling was chosen because it allows every unit in the population an equal chance of being chosen or selected.

### **3.4 DATA COLLECTION INSTRUMENTS**

The study employed questionnaires to collect quantitative data from schools officials who included the Head teacher and Deputy Head Teacher. The semi-structured interview schedules and interview schedules were administered on the District

Education Board officials and Parents – Teacher association executive members while interview schedules was administered in the school officials who included senior teachers and teachers.

### **3.6 DATA COLLECTION**

Data was collected from the respondents using the questionnaire, interview schedule and semi- structured interview techniques. The researcher used questionnaires to get respondents were advised to complete the questionnaire were administered, other researcher read through instructions. The respondents were advised to complete the questionnaire independently. The researcher assisted respondents who needed verification on some questions.

The semi-structured interview schedules were used to get information was used to get information from officials to get the District Education Boards and Parents-Teachers Association executive members. The interview schedules got information from school officials who included senior teachers. The researcher gave each respondent a semi-structured interview schedule and an interview schedule. The interviews were conducted in secluded room which gave freedom of expression.

The data from interviews was captured by tape recorder and the researcher took free notes. The other data gathering technique the researcher used was documentary data was collected from documents such as Class Registers and School Admissions Registers. Class Register and School Admissions Registers availed the researcher enrolments at the schools during the period of the study.

### 3.7 DATA ANALYSIS

Quantitative data were analysed using the Statistical Package of Social Sciences (SPSS) to generate tables, percentages and graphs. The qualitative data from interview schedules and semi – structured interviews were analysed by coding, and categorizing the emerging themes. Content analysis was used to analyse data from written records.

### 3.8 SUMMARY

This chapter presented research design, target population, study sample and data collection among other **Research Methodology** of the study.

In chapter four the researcher would describe access and equity and disbursement of grants to basic schools among other **Findings of the Study**.

## **CHAPTER FOUR**

### **FINDINGS OF THE STUDY**

#### **4.1 INTRODUCTION**

This chapter presents the findings of the study on the effects of the 'free education' policy on access and equity in selected basic schools of Lusaka (urban) and Chongwe (rural) districts in Lusaka Province.

#### **4.2 ACCESS AND EQUITY: DISTRICT EDUCATION BOARDS**

The District Education Boards played a role in the introduction and implementation of the 'free education' policy which was introduced in 2002 at the primary level, Grades one (1) to seven (7). The District Boards were 'conveyor belts' between the Government and the people in the communities they served. The introduction of free education enabled quite a number of children in their districts who had dropped out or had stopped school to return to school during the period of the study under review.

The District Education Board officials 'boasted' that their sensitization 'missions' worked out because parents became aware of the conditionalities of the 'free education' policy, among others Heads of schools not charging PTA user fees and the wearing of school uniform not being compulsory (MoE, Circular No. 3 2002). They revealed that basic schools in their districts had recorded an increase in

enrolments and a decrease in the number of dropouts during the period of the study under review.

#### **4.3 DISBURSEMENT OF GRANTS TO BASIC SCHOOLS**

The study findings have shown that the Government and Co-operating Partners (Donors) were the major stakeholders who funded free education at the Primary level, Grades 1 to 7 during the period under review. The District Education Boards received the Sector pool grants from the MoE Headquarters through the Provincial Education Offices in their respective districts using a quarterly cycle of grants disbursement and accounting procedures (MoE, 2003: Strategic Plan 2003-2007).

The District Education Boards disbursed the grants using the learner population formula. The school with more pupils received more funding than that one with less pupils. The Board Officials however, revealed that the quarterly disbursement never worked out as it was programmed due to some technicalities at the source where the grants originated from. Hence, the quarterly disbursement of the grants to the schools was affected.

Some respondents at the District Education Boards disclosed that both the Free Education and Sector Pool grants they had received from MoE were not sufficient enough to have addressed all the needy areas in their districts. As a result, the distribution of materials for pupils from the free education grants was prioritized. The free education items among others, pens, pencils, rubbers, rulers and exercise books were given to the OVCs.

#### **4.4 ACCESS AND EQUITY IN SELECTED BASIC SCHOOLS OF LUSAKA AND CHONGWE DISTRICTS FROM 2001 TO 2005**

The findings have shown that all the six (6) sampled basic schools had recorded increased school enrolments. There was also increased number of OVCs' who came back to school. The increased enrolments from 2003 up to 2005 in almost all the schools were attributed to the "free education" policy introduced in 2002 which abolished payment of the PTA user fees and other cost sharing measures. The demands for school places at Grades 1 to 7 were overwhelming but schools could not take on every child of school going age due to limited classroom space. Hence, all the six basic schools recorded over enrolment due to demand for school places.

Figures 1,2,3 and 4 below illustrate General and OVCs Enrolments in selected basic schools of Lusaka and Chongwe Districts:

Figure 1: General Enrolment at Three Basic Schools of Lusaka District Education Board from 2001 to 2005.

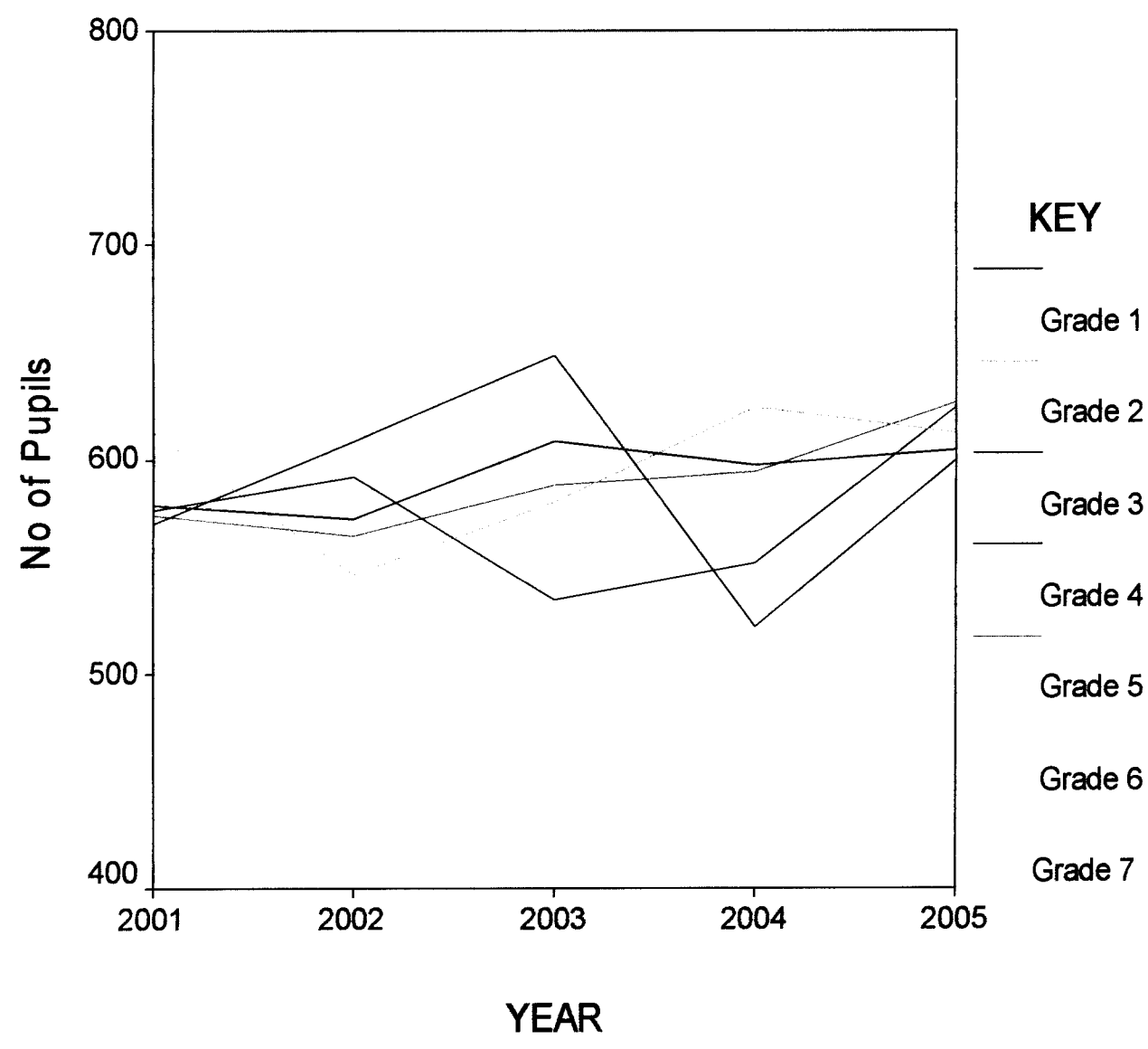


Figure 2: The OVCs Enrolment at three Basic Schools of Lusaka District Education Board from 2001 to 2005.

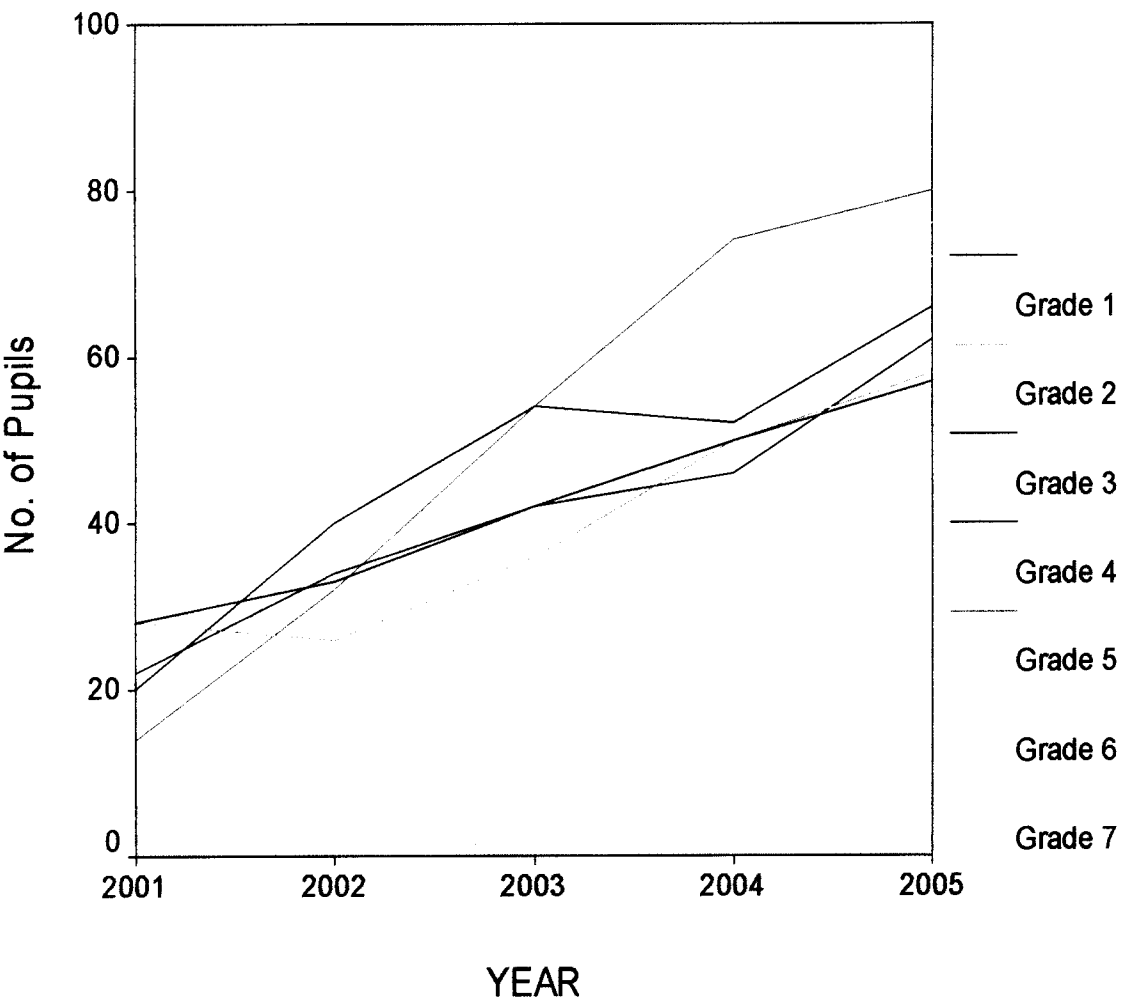




Figure 3: General Enrolment at three Basic Schools of Chongwe District Education Board from 2001 to 2005

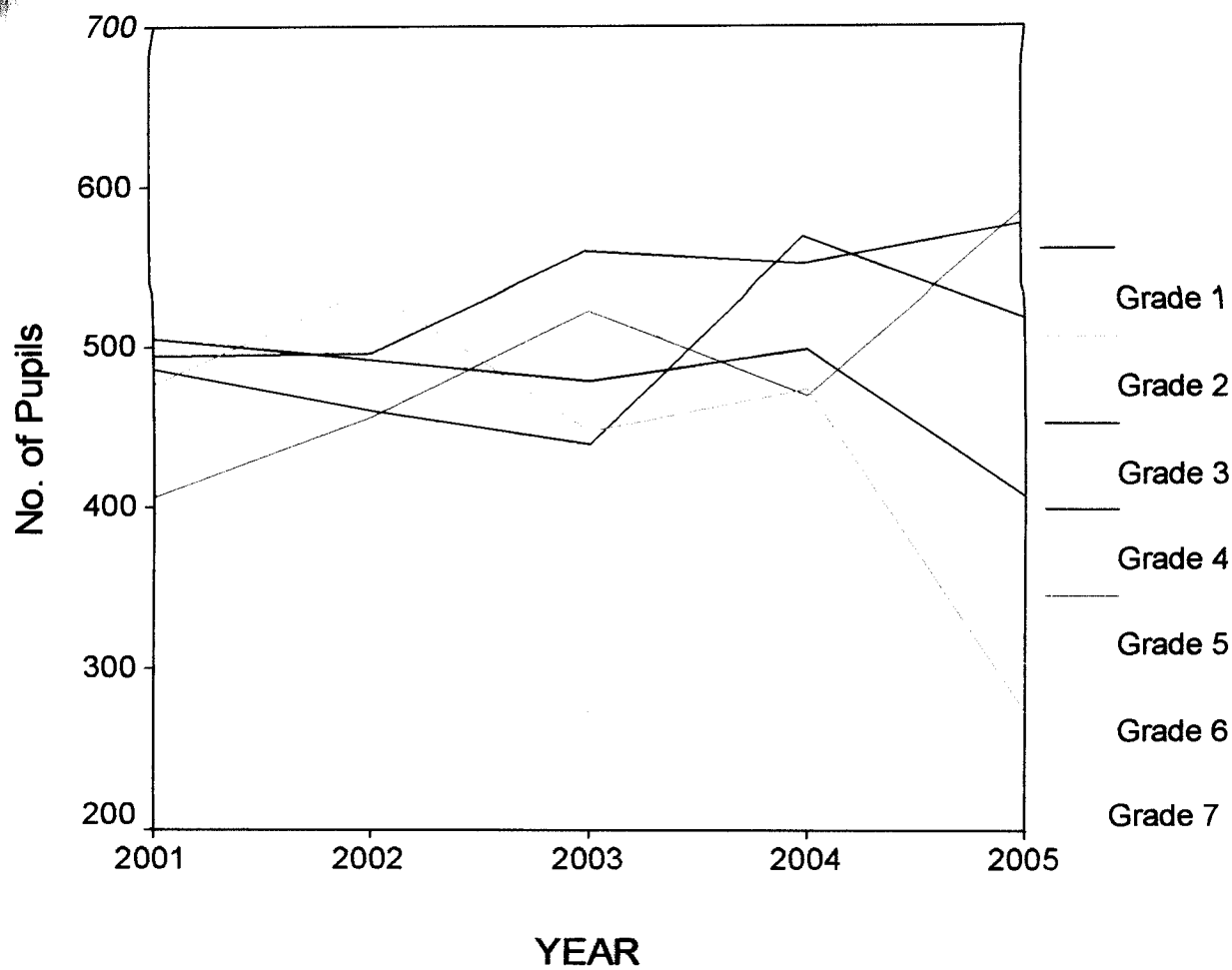
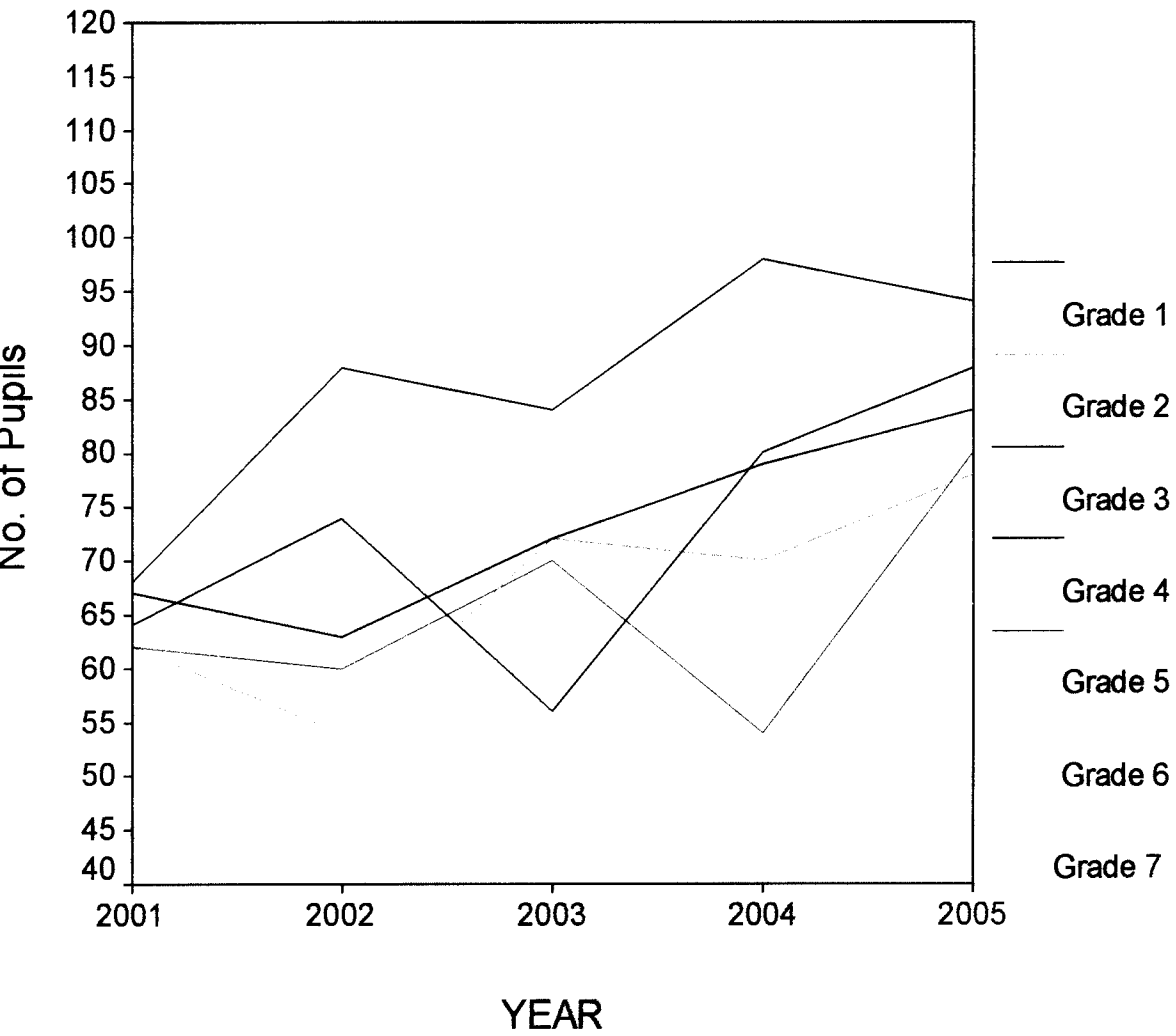


Figure 4: The OVCs Enrolment at three Basic Schools of Chongwe District Education Board from 2001 to 2005.



Chongwe basic school, the only government basic school at the township, recorded 'extreme' over enrolment following the introduction of free education. The class average stood at 60 pupils while the maximum was at 85 pupils. For example, the school in 2001 before the introduction of free education had **99** boys in Grade 6. Four years in the free education era, in 2005, the enrolment of boys increased to 146 pupils. See Table 1 below:

Table 1 : Chongwe Basic School Enrolment by Gender from 2001 to 2005

	<b>G R A D E S</b>														
	1		2		3		4		5		6		7		
<b>YEAR</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>TOTAL</b>
2001	110	112	112	119	120	106	112	112	88	110	<b>99</b>	106	87	79	1,472
2002	114	116	110	121	123	106	116	114	100	108	97	109	94	84	1,514
2003	121	109	105	107	107	136	108	119	118	109	99	129	94	109	1,586
2004	108	133	101	135	106	112	124	150	127	118	116	123	91	116	1,650
2005	109	113	136	133	133	125	122	139	118	124	<b>146</b>	132	131	116	1,777

On the other hand, Kabwata basic school in Lusaka district had 5 girls (OVCs enrolment) in Grade 7 in 2001. The number had increased and stood at 25 in 2005, four years in the free education period. See Table 2 below:

Table 2 : Kabwata Basic School Orphans and Vulnerable Children Enrolment by  
Gender from 2001 to 2005

	<b>G R A D E S</b>														
	1		2		3		4		5		6		7		
<b>YEAR</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>TOTAL</b>
<b>2001</b>	4	6	6	5	4	3	5	4	4	4	5	6	4	5	65
<b>2002</b>	6	9	8	5	12	8	9	11	10	18	13	11	10	9	139
<b>2003</b>	10	12	13	11	14	11	12	16	19	20	21	19	13	12	208
<b>2004</b>	12	12	15	16	16	14	19	17	25	21	23	21	19	17	247
<b>2005</b>	16	14	17	17	21	19	25	20	27	23	25	21	23	25	259

Further findings from the teachers at Chinyunyu basic school in Chongwe district said that some parents who lived near the school preferred an Orphanage to a government school despite the 'free education' being offered. The teachers attributed the preference to the 'wheat' provided by the Orphanage to the pupils which benefited their families too. Hence, they attributed a small increase in the number of the OVCs who came back to the school during the period of the study under review to the feeding programmes and material assistance provided at the Orphanage and Community schools in the catchments area. For example, in 2001 (before the introduction of free education) the school had **153** (49%) total number of OVCs. Fourth year in the free education period, in 2005, the total number of OVCs had increased to **162** (51%). The other basic schools in the districts had similar statistical trends on access and equity during the period under review. See Table 3 below:-

Table 3: Chinyunya Basic School Orphans and Vulnerable Children (OVCs)

Enrolment by Gender from 2001 to 2005

	<b>G R A D E S</b>														
	1		2		3		4		5		6		7		
<b>YEAR</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>M</b>	<b>F</b>	<b>TOTAL</b>
2001	12	9	14	7	11	14	7	10	13	11	9	8	16	12	153
2002	15	10	10	9	16	11	12	9	14	12	7	12	9	13	159
2003	7	14	11	13	10	15	8	11	9	11	10	7	14	12	152
2004	12	13	9	11	12	10	9	10	8	11	12	10	15	11	153
2005	14	11	8	9	13	7	11	14	12	13	13	9	12	16	162

The findings on access and equity in the two districts established that Lusaka district basic schools had enrolled more pupils (general enrolment) and OVCs than Chongwe district basic schools. The disparity was attributed to a small population and distance between government schools in Chongwe district as compared to a big population and many basic schools in Lusaka city. However, all was not lost with the children who were affected by the distance factor. The 56 Community schools in the district provided education to the children who were affected by the long distance factor.

**4.5 GRANTS RECEIVED BY THE SIX BASIC SCHOOLS IN THE STUDY  
UNDER REVIEW FROM 2001 TO 2005**

The findings established that the 6 basic schools received the free education funds from their respective District Education Boards, Lusaka and Chongwe. The schools had received two types of grants, the ‘free education’ and ‘sector pool’ funds.

The two grants had conditionalities as to how the money was to be used. The free education funds procured materials such as pencils, pens, rubbers, rulers and exercise books which benefited the learners directly. The sector pool funds on the other hand, were apportioned according to the needy areas of the schools, among others, stationery, infrastructure maintenance and electricity bills.

The findings further established that the sector pool funds which the schools received from the Boards were determined by enrolment figures or pupil population at a particular school. The schools which had more pupils received more than schools that had fewer pupils. Chongwe basic school for example, was the most populous in terms of pupil enrolment in Chongwe district. The school received more money than the other two basic schools in the study under review. See Table below:

Table 4 below illustrates the total sector pool grants received by the selected basic schools in Chongwe district from 2001 to 2005:

	YEARS					
SCHOOL	2001	2002	2003	2004	2005	TOTAL
Chalimbana	K2,000,000.	K2,000,000.	K3,000,000.	K9,000,000.	K9,000,000.	K25,000,000.
Chinyunyu	K2,000,000.	K6,000,000.	K6,000,000.	K15,070,770.	K8,170,568.	K37,241,338
Chongwe	K2,100,000.	K5,550,000.	K6,000,000.	K21,661,449.	K32,968,302.	K68,279,751

The study established that there were only two basic schools which gave figures of complete amounts of the funds received from the 2001 to 2005. The rest of the basic schools which gave incomplete amounts of free education grants received during attributed it to incomplete or misplaced documentary records of the funds received and also changes at the top management which arose from transfers.

#### 4.6 RESPONDENTS' OVERVIEW OF THE GRANTS

School managements and parents stated that the grants the schools received were not sufficient enough for infrastructure development. Hence, they called upon the Government to allocate more money to schools which would address among others, infrastructural expansion.

Additionally, the school management and parents revealed that the money was not received quarterly or four times annually as should have been the case. The third and fourth quarters were in some cases spilled over to the following year which created operational crises in many areas of the schools' management and administration.

**4.7 INFRASTRUCTURE (CLASSROOM) EXPANSION IN THE SIX (6) BASIC SCHOOLS**

The findings on the infrastructure (classroom) expansion in the six (6) basic schools revealed that only two basic schools had 1 x 3 classroom blocks built during the period 2001 to 2005 on one hand. The rest of the basic schools, on the other hand, had no infrastructure (classrooms) constructed during the same period.

Table 5 below illustrates the statistical data in tabular form on the number of classrooms constructed in the six (6) basic schools of Lusaka and Chongwe districts from 2001 to 2005.

SCHOOL	NUMBER OF CLASSROOMS	TOTAL
CHALIMBANA	3	3
CHINYUNYU	3	3
CHONGWE	0	0
KABWATA	0	0
LILAYI	0	0
NELSON MANDELA	0	0

The respondents from basic schools in the study disclosed that classroom spaces were the major impingement to access and equity in their schools. They reported that their schools experienced over enrolment due to inadequate classroom space.



They further disclosed that their schools experienced over enrolment due to inadequate classroom space which did not match with the demand resulting from the free education. The respondents called on the government to address the infrastructure factor so that every child of school going age, whether in the rural or urban set up would have access to education.

#### **4.8 SCHOOL UNIFORM IN THE LIGHT OF FREE EDUCATION FROM 2001 TO 2005**

The findings on the school uniform not being compulsory directive to all stakeholders in the education provision including the Heads of basic schools, established that pupils who had no uniform were allowed to attend school. The respondents revealed that the school uniform factor had contributed to many pupils in their communities who had dropped out of the system to return. Pupils, especially those who were from the economically disadvantaged homes, were enrolled in schools during the period under study because the wearing of school uniform was no longer an impingement to school attendance.

The findings further established that making school uniform not compulsory had enabled a number of children in their communities to access education between 2001 and 2005. Some respondents from Chongwe district revealed that many parents in their communities had sent back to school children who had dropped out due to not meeting the uniform requirement which had been mandatory before the introduction of free education.

The findings also revealed that all the respondents from the school managements of the six basic schools in the two districts had agreed that many children who had dropped out because of the uniform factor had returned to school. The school managements at Kabwata and Chongwe basic schools in Lusaka and Chongwe districts respectively, disclosed that FAWEZA and CHANGES 2 purchased school uniforms for the OVCs in their schools during the period under study.

#### **4.9. SUMMARY**

This chapter focused on access and equity, disbursement of grants and infrastructure expansion among the findings **of the study**.

In chapter five the researcher will discuss Free Middle Basic Education (Grades 1 to 7) awareness, access equity and factors limiting access and equity among the **Discussions of the Findings**.

## **CHAPTER FIVE**

### **DISCUSSION OF THE FINDINGS**

#### **5.1 INTRODUCTION**

This chapter presents the discussions of the findings. The discussions are preceded by the following sub headings; Free Basic Education (Grades 1 to 7) Awareness, Access, Equity, Free Education Grants, Infrastructure and Factors Limiting Access and Equity.

#### **5.2 FREE MIDDLE BASIC EDUCATION (GRADES 1 TO 7)**

##### **AWARENESS**

This study finding through the questionnaires and interviews established that respondents were aware of the 'free education' policy which was declared by the Republican President in 2002. The respondents stated that they were happy that the Government had scraped the payment of the PTA user fees and other related levies which had led the OVCs to drop out of school. They further stated that free education at primary level, Grades 1 to 7, had led to many children of the school going age, especially the orphans and those who were economically disadvantaged to come back to school.

The school officials cited the decline in school enrolment and increase in the dropout rate of the school going age children as having been some of the factors which prompted the government to introduce free education. The other factors further cited by the respondents were in conformity with Sikwibile A (2003) who highlights the increasing levels of poverty and number of orphans due to the HIV/AIDS pandemic as being among several factors which had led government to abolish fees at this level of the education system. The respondents indicated that the factors alluded to were among others which impinged on access and equity.

Some teachers mentioned that the country's commitment to International declarations had been one other factor which had led the government to introduce free education. They observed that Zambia was not 'an island' but part of the global village. Zambia attended International conferences whose solutions she appended her signature. Two among such conferences were the Education for All (EFA) and the World Education Forum. The EFA conference was held in Jomtien, Thailand in 1990 while the World Education Forum was held in Dakar, Senegal in 2000. One of the cardinal Dakar conference resolutions of the participating member countries was that all the children, particularly girls and women, would have access to complete, free and compulsory primary education by 2015 (A Pastoral Letter from the Catholic Bishops of Zambia on Education, 2004).

Some parents requested the government to consider extending free education to the Upper Basic level, Grades 8 to 9 so that the OVCs at this level could have access to schooling too.

They disclosed that the PTA user fees and other cost sharing measures demanded by school management had a negative bearing on the pupils' active participation in the learning. They also disclosed that pupils were constantly threatened to be sent away from school if they did not pay.

### **5.3 ACCESS**

The study indicated that the introduction of free education at the Middle Basic Education, Grades 1 to 7 had an effect on access. To this effect, the statistical data from the selected basic schools in both Lusaka and Chongwe districts in Lusaka Province showed that all the schools recorded an increase in enrolment. The respondents acknowledged that the abolishing of the PTA user fees and other cost sharing measures had led to an increase in school enrolments. They reported that many school going children who had dropped out of school before the introduction of free education had come back to school.

The foregoing is in line with the MoE (2003) 2005 Annual School Census Statistical data which revealed a marked trend in the schools' enrolments. Many more children were reported to have been enrolled and stayed in schools than before the introduction of the free education in 2002. Further research studies agree with the study findings on the schools having recorded increased participation and general enrolment when free basic education was introduced in 2002. The national total pupil school enrolment had increased by 7 percent in 2002 and the net enrolment had risen by 10 percent in 2005 (MoE, Issue Brief 05 – 01).

The statistical evidence from the MoE (2006, Issue Brief No 06 – 04) was also in support of the study findings that there had been an increase in school enrolment following the declaration of the free Middle Basic Education policy by the Republican President in 2002. The increased enrolment rate between 2003 and 2005 was reported to be comparable to the enrolment rate of the mid and late 1960s when education at the primary level, Grades 1 to 7 had been free. The MoE Issue Brief 05 – 02 (2006) reports that the declaration of the Free Middle Basic Education in 2002 by the Head of State had substantially contributed to improvements in participation and access. To this effect the official total population of the school going children at the primary level, Grades 1 to 7 in 2005, stood at 2 173 500.

#### **5.4 EQUITY**

The introduction of free education by the government at the Primary level, Grades 1 to 7 was intended among others to offer an equitable access to that level of education. The PTA user fees and cost sharing measures which were demanded for the children of school going age to be enrolled in a government basic school led the OVCs to dropout of school. Hence, the government's abolishing of the PTA user fees. Other cost sharing measures were intended among others to assist the orphans and Children with Special Needs (CSN) access quality education. The gender parity at national level in 2005 was 96.2 percent for Grades 1 to 7 (MoE, 2006:2005).