

**MANAGEMENT OF EDUCATIONAL  
MATERIALS IN SELECTED BASIC  
SCHOOLS OF MONGU DISTRICT, ZAMBIA**

**BY**

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



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## AUTHOR'S DECLARATION

I, Iñutu Akushanga Kalumiana, do hereby solemnly declare that this dissertation represents my own work and that it has never been previously submitted for a degree at this or any other university.

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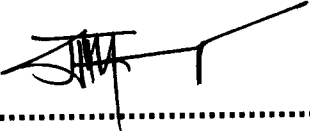
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## **DEDICATION**

To my late parents, my father Benson Akushanga Liswaniso and my mother, Margaret Sepiso, my beloved husband, Oscar Sibote Kalumiana, my children; Mwikisa, Liswaniso, Kalumiana and Sepiso whose support and counsel to my education is greatly appreciated.

**APPROVAL**

**This dissertation by Iñutu Akushanga Kalumiana is approved as a partial fulfillment of the requirements for the award of Master of Education (Educational Administration) degree of the University of Zambia**

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## ACRONYMS

1. ADEA Association for the Development of Education in Africa
2. BAZA Booksellers Association of Zambia
3. BDC Book Development Council
4. BESSIP Basic Education Sub-Sector Investment Programme
5. BPAZ Book Publishers Association of Zambia
6. CDC Curriculum Development Centre
7. CIDA Canadian International Development Agency
8. CPS Central Procurement System
9. CSO Central Statistical Office
10. DEBS District Education Board Secretary
11. DPS Decentralised Procurement System
12. EFA Education For All
13. EMs Educational Materials
14. ESO Education Standards Officer
15. INASP International Network for the Availability of Scientific Publications
16. KKF Kenneth Kaunda Foundation
17. MEN Ministry of National Education-Mali
18. MLS Migrant Labour System
19. MMD Movement for Multiparty Democracy

20. MoE Ministry of Education
21. NEDCOZ National Education Distribution Company of Zambia
22. NEP National Education Policy
23. NECZAM National Educational Company of Zambia
24. PEO Provincial Education Officer
25. PRODEC Education Development Programme
26. PSRP Public Sector Reform Programme
27. PTA Parent Teacher Association
28. RNLB Rhodesia Native Labour Bureau
29. SESO Senior Education Standards Officer
30. UNESCO United Nations Educational, Scientific and Cultural Organisation
31. UNZA The University of Zambia
32. WENELA Witwatersrand Native Labour Association
33. WEPEP Western Province Education Programme
34. ZEMP Zambia Educational Materials Project

## DEFINITION OF TERMS

- Barotse:** A place where the Lozi people live in the Western Province of Zambia.
- Basic School:** A public school offering education at any of the three basic levels; Lower (Grades 1-4), Middle (Grades 5-7) Upper (Grades 8-9) basic levels.
- Bookseller:** A person or firm in the business of selling Educational Materials.
- Classroom:** A room where pupils learn from.
- Cooperating Partners:** Countries, Non Governmental Organizations and the Civil Society that give financial support to the education sector
- Distribution:** The process of delivering Educational Materials from a storeroom to the class/classroom.
- Educational Materials:** Resources in for of goods ranging from prescribed pupils' textbooks, teachers' guides, reference books, readers, maps, atlases, dictionaries, charts, science kits that enhance the teaching and learning processes.

End Users:	Pupils and teachers who are the final users of Educational Materials.
Learners:	Pupils.
Management of Educational Materials:	Systems in place to ensure sustainability of the teaching and learning Materials in schools.
Publisher:	A firm or organization which is involved in the writing, editing and final publication of books.
Reliability:	The extent to which the results obtained using an instrument are consistent.
Respondent:	A person used in the study to provide information.
Stakeholder:	People who have interest in something.
Stores Ledger:	Document where records of receipt and issues are kept.
Tendering Process:	A series of mandatory procurement activities involved before the actual acquisition of Educational Materials.
Validity:	The extent to which correct generalizations can be made from the results obtained from an instrument.

Zonal Centre:

An identified centrally located school amongst other schools located within the same area.

## **EXCHANGE RATE**

Exchange Rate: 1 US\$ = K4,272.96 (source of exchange rate: Times  
of Zambia of 2<sup>nd</sup> April, 2007).

## **ABSTRACT**

Over the recent years, there have been concerns among Zambians with regard to the quality of education in Zambia with a general feeling that it is declining. One of the factors that contributes to quality in education is the availability of adequate Educational Materials (EMs). However, in spite of financial resources, policies and strategies put by the Ministry of Education, basic schools were still experiencing critical shortages of teaching and learning materials. The question to ask is how adequate Educational Materials can be made available to basic schools.

This study therefore, investigated factors that would improve the management of Educational Materials in selected basic schools of Mongu District in Zambia by way of establishing: (i) if the Ministry of Education was procuring sufficient EMs, (ii) whether the EMs procured got to the schools, (iii) key management issues that affected the provision of EMs to basic schools and (iv) to establish the extent to which basic schools implemented the policy on EMs.

The study used a survey design involving questionnaires and interview techniques to obtain information. A sample totaling 251 respondents was selected using random and purposive sampling. As the survey combined quantitative and qualitative methods, the quantitative data was analysed using a Statistical Package for Social Scientists (SPSS)

while that for qualitative data was analysed by coding and grouping similar themes together.

The study found that Educational Materials were still not adequate in most basic schools surveyed. The textbook to pupil ratio was still above 1:3 in core subjects like Mathematics and Environmental Science instead of the recommended ratio of 1:2.

Following the findings of the study, the following recommendations are made in order to improve the management of EMs in Basic Schools:

- (a) Funding for the education sector in general and basic education in particular should be increased;
- (b) There is need to improve the storage of educational materials to increase their life span;
- (c) There is need to continue with central procurement of highly specialized requisites like laboratory equipment as most basic schools had no capacity to procure these on their own;
- (d) The Ministry of Education should constantly evaluate its policies to ensure that they are being implemented on the ground;
- (e) The replenishment of Educational Materials should be made when need arises and not after 5 years as per the prevailing policy at the time of writing this report in the year 2007;

- (f) There was need for the Ministry to ensure that all key educational personnel clearly understood the existing policies so as to achieve successful implementation of such policies.

# CHAPTER ONE

## INTRODUCTION AND BACKGROUND TO THE STUDY

Education is a household name to many people due to the great role it plays in society at all levels of development. Be it at individual, community or national level, education is a factor of development. A UNESCO Report (1992:10) states that:

*Apart from the skilled manpower which it provides, educated society provides the literate clients that are more likely to accept innovations and objectively use informed judgment to decide what to do with such innovations.*

From this realization, effort is continuously made to invest heavily in the education sector in order to achieve set goals. Similarly, some leaders in developing countries have understood the benefit of investing in basic education as they have notably realized that high levels of literacy and numeracy are necessities for active citizens (ADEA 2002:1). The former president of Tanzania, Mwalimu Julius Nyerere, stated that education was not a way of escaping the country's poverty but it was a way of fighting it (<http://www.un.org/ecoscodev>). In the same vein, the Japanese ambassador to Zambia, Masaaki Miyashita observed that education was a major factor in economic and social development (Times of Zambia, May 20, 2006:3).

It should, however, be mentioned that the education to be provided is not just provided for the sake of it but rather should be of sound quality. Formal

education in Zambia can be traced to the year 1883 when the first school called the Barotse Mission School was established at Lealui in Mongu District of the Western Province by Fred Arnot of Plymouth Brethren (Snelson 1974:27). Since then the education system in Zambia and elsewhere has not been static but has undergone several reforms whenever there was a felt need to make adjustments and improvements in areas requiring attention. We have had educational reforms like those of 1977 which comprehensively overhauled the whole education system that had been offered during the pre-independence period in order for it to be in line with the aspirations of the people as construed by the ruling government then. At the global level, one of the outstanding stages in the process of education provision was the World Conference on Education For All held at Jomtien, Thailand in 1990. The Conference aimed at exploring ways of providing quality primary schooling for children around the world and access to essential knowledge for adults to cope with the demands of the modern world (Kelly, 1992:1).

Quality educational provision is therefore one of the major areas of focus in the educational delivery system of any country. According to the Ministry of Education (MoE: 1996:26) one of the main purposes of the school system is to provide quality education to the learners. MoE defines quality as follows:

*A well functioning education system should be able to point to evidence of the personal incorporation by children of useful knowledge, reasoning ability, skills and values. Its success should be judged by the success of the teaching- learning process in developing the analytic skills of children, promoting their ability to form and*

*transform concepts, enabling them to use knowledge as well as to acquire it, stimulating them to identify and solve problems.*

Quality refers to how good or bad something is (Macmillan School Dictionary 2004:591). The education provided therefore, should target the cognitive development of the child with an aim of equipping that child with the values and attitudes that are acceptable to society. Education plays a key role in the transformation of children into responsible citizens and one of the best ways to restore quality in the Zambian educational system is through adequate provision of Educational Materials (EMs).

### **1.1 The Concept of Educational Materials**

Educational Materials (EMs) are concrete products used for the direct or indirect promotion of pupil-teacher interactions to facilitate learning and the realization of education goals (UNESCO 1992:12). In this study, EMs referred to materials as categorized below:

- i) Textbooks;
- ii) Readers;
- iii) Workbooks and Teachers' Guides;
- iv) Writing exercise books;
- v) Audio and visual aids;
- vi) Laboratory equipment.

## **1.2 Significance of Educational Materials**

Bruner (1966:81) observes that there has been a great deal of discussion about EMs that can be employed to help in the teaching process. Similarly, Crow (1961:225) points out that adequate implementation of modern curricular requires the provision of teaching and learning materials. MoE (1996:84) indicates that quality educational provision requires the supply of Educational Materials in sufficient quantity to meet the needs of the students. Banda (1977:16) supports this by stating that experiments on the effect of teaching aids on learning have repeatedly shown that learners who use aids perform better than those who follow instructions without aids. It is against this premise that the Ministry of Education has in the past come up with interventions through various programmes and projects to specifically address the EMs provision to schools. Specific education projects which included the aspect of Educational Materials provision was the Zambia Educational Materials Project (ZEMP) of 1989, Zambia Education Rehabilitation Project of 1993 and Basic Education Sub-Sector Investment Programme (BESSIP) of 1999.

The role EMs play in quality provision has been widely recognized through out the world. This is most important in the Sub-Saharan Africa where there is a severe shortage of reading materials (World Bank Report 2002: V).

EMs are tools by which pupils are given experiences of events. Secondly, they help the learner to grasp the underlying structure of a phenomenon.

Laboratory experiments are a classic aid in such an activity. Thirdly, EMs in form of textbooks and charts are adjuncts to the effort of producing clarity as they assist in the acquisition of clear concepts of subject matter and provide richness in learning experiences that can be gained in no other way (Callahan 1966:114). The World Bank Report (2002:5) adds that next to a good teacher a good textbook is the most effective medium of instruction. Furthermore, when teachers are under qualified, underpaid and under motivated, the textbook and the teacher's guide are of crucial need.

Lastly, EMs help learners establish a sense of conceptual structure of the things they observe. In summary, EMs help to extend the pupil's range of experiences by helping him/her to understand the underlying structure of the material being learnt and also dramatizes the significance of what is being learnt.

### **1.3 Historical Background of Educational Materials provision in Zambia**

The beginning of Educational Materials (EMs) development in Zambia can be traced back to 1937 when the African Literature Committee of Northern Rhodesia was established and charged with the responsibility of promoting readership and authorship in Zambia (INASP, 2002:94). According to a report by Bellagio Publishing Network of 2000, the Publishing Industry started in the pre-independence period before 1964 when an open-door policy operated in the country. The development of EMs can thus be

grouped under three phases, namely: the colonial phase, the independence phase up to 1990 and the current phase.

The post-independence phase is the period after 1964, when the nationalisation of book publishing and distribution was put in place in 1966 (Bellagio Publishing Network Newsletter of 2000)

During this period the then Kenneth Kaunda Foundation (KKF) was established by the government in 1966 with the mandate to publish, market and distribute Educational Materials to schools. The creation of KKF brought with it the monopoly in the supply and distribution of EMs. This was the time when the Zambian Government was at the centre of the nationalisation of the economy with the view of promoting the Humanism Philosophy. The KKF was therefore almost the sole supplier of EMs as it was the role of the Curriculum Development Centre to prepare EMs for KKF to publish and later sell to the Ministry of Education. In 1967 the KKF formed two subsidiary companies, the National Educational Company of Zambia (NECZAM) which was a publishing company and secondly, the National Educational Distribution Company of Zambia (NEDCOZ) which was charged with the responsibility of marketing and distribution. Under this system, the outside Publishers of various EMs could not survive and no sooner had they come into the market than they folded up. At the time, there was a centralized system regarding the provision and distribution of EMs. Under this system teachers and pupils who were the direct users of the materials did not make

any decision on the type of EMs they required. All the decisions involving the selection, quantities and distribution was made by the MoE headquarters.

The third phase was ushered in soon after the Third Republic which came into being in 1991. The Bellagio Publishing Network further states that:

*Less than one month after taking over the reins of power, the newly elected Government of the Movement For Multiparty Democracy (MMD) proclaimed the liberalisation of production and supply of Educational Materials in Zambia.*

This meant opening doors to other suppliers of EMs in the country to compete with the already existing KKF. Publishers of various EMs went round in schools marketing their products. INASP (2002:69) notes that the Third Phase experienced the return of multinational publishing companies like Longman Zambia, Oxford University Press, Macmillan Publishers Zambia Limited and the emergence of a substantial number of new private publishing companies. The KKF was renamed Zambia Educational Publishing House (ZEPH); the name the company still holds.

#### **1.4 Current Mode of Provision of Educational Materials to Basic Schools**

In line with the MoE 1996 Education Policy, the provision of textbooks and other teaching and learning materials is done on liberalization basis. The Ministry of Education has decentralized the provision of EMs to schools. Under the decentralized system, EMs are provided through the involvement of stakeholders. These include the Ministry Headquarters, Provincial Education Office, District Education Board Secretary's office, School level,

Publishers and Booksellers. Each stakeholder has a role to play and collectively perform the functions in the supply chain of EMs to schools. The cardinal point under this system is maximum involvement of the direct users of the EMs. Thus the teacher is of great importance in the selection of EMs and other processes involved in the acquisition of EMs.

Although the Ministry has decentralized the procurement of EMs following the Public Sector Reform Programme (PSRP), it must be pointed out that not all EMs are acquired through the decentralized system. Depending on the nature of the EMs and the source of funds, it may be imperative to provide certain EMs through the central procurement system. Specialized materials (like laboratory equipment which are not readily available and are costly to procure especially when values are small) can still be procured through the Central Procurement System. Besides, the Government of the Republic of Zambia is collaborating and working in partnership with various Cooperating Partners (countries which provide financial support to Zambia) to provide EMs to pupils in all the schools. Some of the funds acquired from cooperating partners can only be utilized under central procurement whereby tendering processes are undertaken and ultimately contracts signed with a successful bidder. EMs under this system are delivered to a central warehouse and then later distributed to schools through an identified transporter.

## **1.5 Structure of the Education System**

Zambia's formal education system consists of academic learning at the basic, high school and tertiary levels. The system is slowly moving from a 7-5-4 education structure (seven years of primary education, five years secondary and four years of university) to a 9-3-4 ( nine years of basic education, three years of high school and four years of University education). *"The Education Sector has an important role to play in the social and economic development of Zambia"*(MoE 1996:20). The knowledge and skills available in the human resource for which the education sector is responsible play a pivotal role in national development.

Basic education is notably of greater value to the economic survival of the country in that it is the only formal education that the majority of the young people receive (MoE 1996:2). It is the foundation upon which further education is built. The Japanese ambassador to Zambia, Masaaki Miyashita adds that basic education occupied a critical role in the education system as it is the entry point for general literacy and numeracy (Times of Zambia, May 20, 2006:3). Lungwangwa (1987:3) points out that one of the challenges in the Zambian educational system is the need for more expansion in basic educational facilities. He goes on to note that basic education affects larger groups of the population in the country and resources spent on it are considered a good investment because education enhances equity.

## **1.6. Background to the study**

A society or an individual that is the same yesterday, today and forever does not command respect (Morrish 1976:1). This implies that change is inevitable and it comes about due to desired need to correct or improve upon something. This is so because the world is not static and therefore things cannot remain the same. Similarly, the Ministry of Education is constantly making reviews of its systems to determine the impact it is making on the society as a whole.

The Ministry adopted, formulated and implemented the Books and Educational Materials Policy that emphasized the need for the Ministry to work together with publishers and suppliers to ensure an effective supply of textbooks and other educational materials (EMs) for use in schools. The Ministry also encouraged the development of a strong and competitive local book industry.

Following the liberalization of the book industry in 1991, the Ministry witnessed an influx of publishers and suppliers of educational materials enter the market. In fulfillment of the policy objective which states that:

*Quality educational provision requires the supply of books, writing materials and other educational items in sufficient quantity to meet the needs of all students* (MoE 1996:84), the Ministry with financial resources from both the government and the international community has

been channeling funds towards acquisition of various educational materials to basic schools in Zambia.

The policy further states that the availability and use of Educational Materials have a positive effect on student learning and in their absence learning occurs only with difficulty. Rosenberg (1998:1) adds that one of the fundamental requirements of all educational systems is the adequate provision of relevant and appropriate educational materials for use by teachers and pupils. The World Bank (2002: 5) reports that:

*The provision of textbooks has been linked directly to improved student performance. In classrooms without adequate textbooks, time is wasted, while teachers dictate lessons and write information and exercises on the blackboard for students to copy into their notebooks.*

In spite of the Ministry's continued efforts in the provision of educational materials, the Ministry has not fully succeeded in providing basic schools with the EMs required. Pupils either lack the required EMs like textbooks or require sharing them extensively with others. It seems therefore that there is a shortage of EMs in basic schools of Zambia. It is also noticeable that there are also variations between urban and rural schools, between subjects and between grades.

### **1.6.1 Profile of Mongu District**

Zambia is divided into geographical regions based on relief, climate or the way land is used (Naidoo, 1995:118). The regions are referred to as provinces and each province consists of districts. There are nine provinces

altogether and the Western Province is one of them. The Western Province was formerly known as Barotseland in colonial times and as Bulozhi before then. The province is part of the Central African Plateau lying at some 1050m above sea level (Wood 1989:3). This particular province has seven districts and Mongu District is the administrative headquarters.

Mongu is the provincial headquarters of the Province. It lies on the edge of the Bulozhi Plain (Naidoo, 1995:142). It is connected by a tarred road and by air to Lusaka, the capital city of Zambia. Limulunga, which lies to the north of Mongu, is the summer capital for the paramount chief, the *Litunga*, while Lealui is the winter capital. Mongu district is characterized by the Bulozhi Flood Plain which stretches along the Zambezi River between latitudes of 14°S and 16°S (Naidoo 1995:142). Away from the flood plain are woodlands with high sands and there are prominent occurrences of circular depressions or dambos, ranging in length from a few hundred meters to a few kilometers across.

### **1.6.2 The Barotse Agricultural System**

According to Schultz (1976:104) two major factors distinguish the system; firstly there is the extensive use of the flood plains in cultivation and the fields are small. Secondly, there is a complex variety of agricultural techniques which have been developed in adaptation to the various natural conditions. The necessity for land rotation in the sandy areas contrasts with an almost continuous utilization of the alluvial flood plains.

The most important crops are maize on the plains and cassava on the Barotse sands. On the Barotse Plain and along its edges, all the farmers cultivate maize. Further away where the Barotse sands are more predominant, only three out of four farmers do so (Schultz 1976:104).

Fishing is the third important feature of the land usage, after cropping and herding. Seasonal migrations are common in the central part of the Barotse farming region. After the floods subside in June, cattle are driven on to the plains where the pasture is good throughout the dry season.

### **1.6.3 The Socio-Economic Status of Mongu District**

The predominant language of communication is Lozi being the most spoken. Other languages are Mbunda and Luvale. Historically, one outstanding economic activity in the then Barotseland was the Migrant Labour System (MLS) (Wood 1989:4). Wood reports that from the early years of the century, the Rhodesia Native Labour Bureau (RNLB) was recruiting labourers for the gold mines on the Rand in South Africa. Wood (1989:4) in quoting (Peters 1960:1X-X ) states that by the late 1940s, about fifty percent of adult males were absent from the province.

The Barotseland's economy was characterized by a concentration on supplying labour to South Africa and Rhodesia. There existed what was called a recruiting agency in South Africa called the Witwatersrand Native

Labour Association (WENELA). This was an agency created and given exclusive rights to recruit labour from the southern region. Major efforts were therefore made shortly after independence to merge the province into the Zambian Economy. Some of the efforts were the banning of MLS in 1965 and the completion of the first all-weather road from Mongu (the provincial capital) to Lusaka.

As reported in the Social Watch Report (2001:174), Zambia is one of the poorest countries in the world with startling disparities between the rich and the poor. The Report adds that it is not uncommon to find pupils in rural areas without textbooks, blackboards, chalk or dusters. Education provision in Mongu district has not been spared from the many problems affecting education delivery. The MoE Report (WEPEP) (1998:10) states that:

*By whatever macro-economic or educational indicators we measure, the situation is more difficult and more backward in Western Province than in the rest of the country, with the possible exceptions of parts of Luapula, Northern and Southern Provinces.*

Kelly (1994:3) adds that marginalization and disadvantage are likely to be the lot of those living in Western, Northern, Luapula, Eastern and North Western Provinces. The Central Statistical Office Census Report (2004:18) indicates that Western Province has a young population. Out of the total number of 708,133 persons in 2000, 44.8 percent were below the age of 15. This therefore implies that the majority of the population is that of school going children. It is for this reason that interest arose to conduct a study on the Management of EMs in Mongu District bearing in mind the aspect of the rural economy as a major characteristic of the area.

#### **1.6.4 Statement of the problem**

The Ministry of Education aims at achieving book to pupil ratios of 1:2 for textbooks and 1:5 for supplementary materials in schools. Although, there has been a steady improvement in the provision of EMs through the channeling of increased government and donor resources into this area, it is still observed that there are insufficient Educational Materials in basic schools. Despite the Ministry of Education's policies and strategies aimed at addressing the steady supply of EMs, their availability still remains below the expected standard.

This has created a lot of concern for many stakeholders in education requesting for improved quality in the educational delivery system.

#### **1.6.5 Purpose of study**

The purpose of the study was to identify factors that would improve the management of Educational Materials in basic schools.

#### **1.6.6 Objectives**

The following were the objectives of the study:

- i) To establish whether or not sufficient EMs were procured for basic schools;
- ii) To establish whether or not procured EMs actually got to the intended users;

- iii) To identify management issues that would improve the availability of Educational Materials in basic schools.

### **1.6.7 Research questions**

The study sought to answer the following Research Questions:

- i) Are sufficient EMs procured for basic schools?
- ii) Do Educational Materials procured get to the end users in the right quantity and right quality?
- iii) What are the key management issues that affect the provision of Educational Materials to basic schools?
- iv) To what extent do basic schools implement the policy on Educational Materials?

### **1.6.8 Significance of the study**

It is hoped that the study may bring out some of the major problems faced in the management of EMs in basic schools and suggest solutions that would improve the provision of EMs. In addition, the study may help in providing relevant information required for the improvement in the distribution of EMs to basic schools. The results of the study may also assist the Ministry in reviewing the existing collaboration with suppliers of EMs to find an optimum level of getting them to the intended users. Through the research findings, it is hoped that the study may contribute to the body of knowledge on the subject and stimulate interest amongst researchers to investigate further aspects of EMs tracking in schools.

### **1.6.9 Limitations of the study**

The study was limited to Mongu District instead of covering all the districts in the province. At the same time, the study did not cover all the basic schools in Mongu Districts due to inadequate financial resources provided by the sponsors of the study.

## **CHAPTER TWO**

### **LITERATURE REVIEW**

This Chapter gives a review of a literature on the situation of Educational Materials from the Global and African perspectives. The Literature Review provides an overview of the many problems affecting the Educational Materials provision, accessibility and distribution.

#### **2.1 The Global Context of Educational Materials**

The role of Educational Material (EMs) in the teaching and learning process has been strongly emphasized by national authorities (UNESCO 1996). Similarly, the Education For All (EFA) Report (2000:2) acknowledges the textbook as the most important item in the educational systems of the post – communist countries. Historically, it grew to be a mirror reflection of the curriculum. The EFA Report (2000:i) states that textbook shortages in the Central and Eastern Europe vary and their availability are determined by a number of factors. For the Visegrad countries (Czech Republic, Hungary, Poland and Slovakia) for instance, the production and provision of educational materials has been strongly influenced by educational reforms of those countries.

The Baltic countries on the other hand have had their economies improving. Although the economies in this region are improving, they are still fragile and the shortage of disposable income affects the production and dissemination

of Educational Materials (EFA Report 2000:1). Overall, Central and Eastern Europe has been affected by political changes which brought in widespread initiatives for economic and social reforms.

*"Serious distribution problems are common to most countries in the region"* (EFA Report 2000:14). Different countries are using different systems of textbook distribution and flaws are detected almost everywhere. Estonia and Poland have publishing companies which work in collaboration with private wholesalers. In Lithuania, the former state distribution organization "Kniga" has been privatized. The distribution of EMs has been taken over by the Lithuanian Ministry of Culture and Education Publishing Centre. Private wholesalers have emerged but few are reliable.

Bulgaria similarly is one of the countries in economic transition suffering from the after – effects of Soviet-style socialism. The Book Sector and other teaching and learning materials' availability have suffered particularly as a result of the collapse of the centralized distribution, subsidized low pricing and the absence of any commercial criteria. The government could no longer sustain the former structure, which meant that the state withdrew its support and allowed an elaborate infrastructure to collapse. The Bulgarian Book Sector is in difficulty and the major problems as per report on Book Sector (<http://www.osi.hu/cpd>) are:-

- i) There is no National Book Policy;

- ii) There is no attempt to harness the activities of the many state agencies involved with books;
- iii) International legislation and agreements relating to books, many of which have been signed only recently, are poorly understood especially by those who have to implement them;
- iv) Government spending on libraries throughout the state system has fallen in many cases to zero;
- v) It is in serious difficulty following the collapse of the centralized distribution system.

The new system of privatization opened up the market and a number of private publishing houses mushroomed with a peak in 1993 and it suffices to say that the Book Industry has been struggling to survive. Print runs have collapsed such that 1,500 to 3,000 copies would be regarded as a large print run (<http://www.osi.hu/cpd>)

School textbooks are provided at no cost to pupils from Grades 1 to 8 from the national education budget. The procurement of these books is done through tendering processes. The system is good in that quality control of the books supplied is guaranteed. However, there are problems of late delivery of books to schools. At the same time there are errors experienced in the delivery. According to a Report by Kingham (1998:4), the major problem is the distribution system. It is reported that a number of retail bookselling outlets has collapsed as a result of a shift into other profitable goods. Book retailing has been taken over by street traders each with a small table or booth and only a limited range of titles are being sold. Where

as there is an extensive library system from the National Library down to some reading clubs in local cultural centres, there is inadequate funding to support the libraries regarding their development (Kingham 1998:4).

A similar situation is also prevalent in the Hawaii public schools. Essoyan (<http://starbulletin>) observed that the situation of EMs supplies in schools was serious. A volunteer who offered to teach English Language to a ninth grade observed that 30 textbooks were shared amongst 100 pupils. The teacher lamented the difficulty he had for pupils to do their homework without textbooks. A survey conducted by the Board of Education in 2000 revealed that only 2 out of 71 schools reported that they had enough EMs. The rest reported that there was a shortfall of 134,000 books (<http://starbulletin>).

The Hawaii education system has pumped in funds for school supplies but even so, the problem still exists as the money for the school textbooks is disbursed as a lump sum every year and distributed to all the schools. The difficulty with the lump sum disbursement is that the school principal has a leeway to use the funds according to the priorities for the school. In some cases money for textbooks is used to buy computers and pay teachers who are employed on temporal basis. At the same time textbooks become outdated with the passage of time, others are damaged and some get lost.

## **2.2 The African Context of Educational Materials**

In Africa, the production of EMs has equally received a lot of effort but scholars have observed the absence of a conscious and concerted effort at regional levels (UNESCO 1992:9). Access to textbooks and other teaching and learning materials have been considered to be key to the development of quality basic education ([http://www.acdi\\_cida.gc.ca](http://www.acdi_cida.gc.ca)). This is universally accepted but most African countries have found it difficult to ensure an adequate stable supply. Mali is cited in recent decades that too many schools in that country have faced a chronic shortage of EMs ([http://www.acdi\\_cida.gc.ca](http://www.acdi_cida.gc.ca)).

Realizing this precarious situation, Mali with assistance from the Canadian International Development Agency (CIDA) in 1997 implemented a ten-year Education Development Programme (PRODEC). The project provided textbooks and training materials to the Ministry of National Education (MEN). According to the report, the financial support provided has allowed book publishers and dealers to produce and distribute about three million textbooks giving an average book to pupil ratio of 1 to 5 textbook in key subjects.

Nevertheless, MEN realised that merely supplying EMs would be a temporal solution. Without a mechanism in place to renew supplies, another shortage would occur in years that followed. Consequently, the textbook procurement

reform called for major changes. The changes aimed at bringing sustainable development of the textbook sector.

Nigeria, like many African countries witnessed a rapid demand for education in the last twenty years. In 1975 there were 21,223 primary schools and by 1987 there were 24,240 (UNESCO 1992:98). However, the quantitative gains have not matched with qualitative development. The outcome has been unfortunately, falling standards of education. A survey that was conducted in 1981 to investigate availability of a series of five textbooks developed, produced and distributed under the Universal Primary Education Teacher Education Materials Development Project, revealed that 49.5% of the targeted population used the books while 50.5% did not (UNESCO 1992:104).

*"On the whole there is recognizable dearth of Educational Materials in Africa"* (UNESCO 1992). The ADEA Report (2000:1) adds that visitors in Africa often observe the shortage of books in the classrooms. "For a long time, aid to education in Africa has tried to solve this problem by improving the production and supply of textbooks" (ADEA, 2000:1). It is noted that the problem is related to the coordination and distribution of EMs supplies. Rosenberg (2000:19) adds that discussions on the ways and means through which school pupils access these EMs have failed to take place. It is noted that once EMs have been written, published and printed, their distribution and adequate availability in schools seems to be problematic. The author

further points out that providing an adequate supply of EMs for use by teachers and pupils is not just a question of money for purchase but that the process of their distribution into the hands of the users is of great importance.

UNESCO (1990:3) acknowledges the fact that the production and distribution of EMs in developing countries is facing a number of problems. Additionally, it is stated that with the results of experience and research, it is no longer possible to treat EMs as something incidental or accessory to the educational process. On the contrary, it has been proved that EMs play a fundamental role in the acquisition of knowledge by pupils. UNESCO (1990:3) states, "The distribution process should be analysed as a function of three criteria, the economic aspect, the inventory management and transport." The three aspects are inter-dependent and prominent problems of the distribution process. *"Distribution often remains one of the unresolved problems and that aspects connected with EMs distribution should be the subject of careful reflection with a view to highlighting strategies suitable to the national reality as well as local conditions"* (UNESCO 1990:24)

UNESCO (1992:9) says that many African countries have lost what they gained in education at pre and post independence. There are many factors to this, partly because of the present climate of structural adjustment programmes and steep population increases in enrolments. This trend has negatively impacted on the quality of education thereby lowering the

standards. *"For a long time, hardly any industry existed in African countries which could print EMs"* (UNESCO, 1992:10). This meant that all the requirements that go with the production of materials were imported. The other factor that has slowed the pace of EM development in Africa lies in the inherited culture of viewing imported materials as more superior than the locally produced ones.

In African countries, the availability of EMs deteriorated during the 1980s. This was mainly due to economic decline, political unrest and competing priorities for other social service funding (UNESCO, 1992:9). The situation however improved in the 1990s due to an inflow of resources by donors in educational materials related projects and programmes. The report further states that severe shortages particularly in rural areas are still evident. It is further observed that many countries of the developing world, lack simple basic materials like books, comics, magazines and newspapers and the classroom is the only place where children will come into contact with words in written form.

*"Many studies have been undertaken and conclusions reached on the best ways to revitalize education in Africa"* (Rosenberg, 2000:1). The shortage of EMs remains problematic thereby impeding literacy and efficient schooling. Resenberg (2000:1) in quoting the World Bank (1988:35) says, 'There is a strong evidence that increasing the provision of Educational Materials is the

most cost- effective way of raising the quality of primary education. "The scarcity of learning materials in the classroom is the most serious impediment to educational effectiveness in Africa. The role of EMs in the teaching and learning process cannot be overemphasized. National authorities, organizations and funding agencies in developing countries have come to invest heavily in the provision of EMs. Nonetheless, today, still many schools suffer chronic shortages of EMs.

### **2.3 Educational Materials within the Zambian Context**

In Zambia, progress has been made in the area of education since independence. Important reforms like those of 1977 were undertaken in an effort to improve the provision of education in the country's development. In spite of the major education reforms initiated, the country has undergone severe economic depression and most of its resources have been directed to other social services.

A report by UNESCO (1996:56) states that books are scarce and that it is difficult to distinguish supplementary material from course material. In addition, the teachers' handbooks are in short supply. ADEA (2000:1) states that vast quantities of books procured by the Ministry of Education do not reach the classrooms. It is reported that schools receive only a small fraction of the books reported to have been procured, for instance, between 1991 and 1998 a total of 14.5 million textbooks, supplementary readers and

teachers' guides for grades 1-7 were procured and distributed but not all distributed books reached their targeted schools.

The ADEA Report further state that in 1998, basic schools required a total of 170,634 of Grade 3 Mathematics books but only 35,206 were available.

Similarly, there was a procurement of 900,000 readers which amounted to 70.3% of the need but only a tiny fraction of 8.8% of the readers was received.

Whereas EMs maybe provided even though in small quantities, teachers lacked capacity to use the books productively

(<http://www2.unesco.org/wef/countryreports/zambia/rapport>).

This, therefore points to the fact that there is the growing problem of lack of adequate provision of Educational Materials to basic schools in Zambia.

The Ministry of Education, being one of the vast and major social service providers in the country has a series of delivery points of EMs. As a result of this vastness, it has many stakeholders who make decisions on the EMs supply and delivery chain vis-à-vis the distribution of EMs. It should be noted that there are several processes involved in the acquisition of EMs prior to getting them to the intended users. The linkages seem to form the whole supply chain of Educational Materials from the Publisher/Bookseller to various MoE officers up to the classroom.

In Zambia, Educational Materials provision has suffered set backs too as a result of many factors such as lack of adequate financial resources, lack of

capacity by local personnel to produce the EMs, absence of clear guidelines and the over dependence syndrome. Further, literature has revealed that quality education will be realized if EMs (a factor that promotes quality in education) are adequately available in schools.

## **CHAPTER THREE**

### **METHODOLOGY**

#### **3.1. Background**

In this chapter, the methodology used is discussed by way of giving full description of the research design, overall population, sample size, research instruments and data collection procedure. In addition, the validity of instruments is discussed as well as the difficulties encountered in the field.

#### **3.2 Research Design**

According to Sim and Wright (2000:7), a Research Design is the overall plan and structure of a piece of research. A design is regarded as a framework into which particular methods are fitted. In this study, a survey design was used. The strength of this type of design is its ability in establishing facts and its highly recognition as a means of getting social facts and views. Both qualitative and quantitative approaches were adopted.

#### **3.3 Population**

The target population was ninety-two (92) basic schools consisting of the Lower, Middle and Upper Basic Schools of Mongu District. The study placed emphasis on collecting data from the Ministry of Education policy makers, headteachers, teachers, pupils, parents and suppliers of Educational Materials.

There were 293 male teachers, 518 female teachers and 92 head teachers respectively in Mongu District (MoE 2005).

### **3.4. Study Sample Size and Sampling Procedure**

The study comprised of a sample of 14 basic schools (lower, middle and upper basic) , 98 class teachers, 11 headteachers, 90 pupils, 35 parents, 8 suppliers of Educational Materials, 1 Provincial Education Officer, 1 District Education Board Secretary, 2 Planning Officers, 4 SESOs, 1 Education Standards Officer and 1 Stores Officer. Stratified Random Sampling was used to select the 14 schools. Details of the schools surveyed are in Appendix VII.

Sim and Wright (2000:116) define Stratified Random Sampling as a type of sampling whereby a population is divided into homogenous subset strata and then the units are randomly selected. This was used because schools were divided into Lower, Middle and Upper basic. Purposive Sampling was used to select the Ministry of Education officials at Provincial and District levels. This was used because the number of officers at the two levels was limited. The same was also used to select suppliers of Educational Materials. Simple Random Sampling was used to select Grade 6 and 9 pupils.

### **3.5 Research Instruments**

Data Collection Instruments consisted of questionnaires and informal interviews. Three separate questionnaires were administered; namely, the

Ministry of Education Officials', Basic School Headteachers' and Basic School Teachers' questionnaires. The questionnaires had 34, 27 and 30 questions, respectively (for details refer to Appendices I – VI).

Interview schedules were used for pupils, parents and suppliers of Educational Materials. There were 14 questions for pupils, 9 for parents and 6 for Suppliers of Educational Materials.

### **3.6 Validity and Reliability of the Instruments**

Sim (2000:123) in quoting Sim and Arnell says that data are said to be valid when they represent what they purport to represent, and meaningful inferences can be drawn from them. On the other hand data are reliable if they are reproducible or consistent. This means that data gathered on a particular entity will be the same when gathered by different investigators. In this study, the validity and reliability of the instruments were enhanced through a pre-test of instruments. This was done at Lusaka Girls, Ngwerere and Mumuni Basic Schools.

### **3.7 Data Collection**

Questionnaires were self administered by the author to all the 14 schools. A set of questionnaires were administered to 14 Basic School headteachers, another set for basic school teachers was administered to 98 teachers. The Ministry of Education officials at the Provincial Education Office and District Education Board Secretary's office were given another set of questionnaires

and a total of 9 questionnaires were administered under this category. Some key questions were asked in all the three types of questionnaires for the headteachers, teachers and Ministry of Education Officials.

The respondents in urban and peri-urban basic schools were allotted a time frame of 5 days within which to fill in the questionnaires. This was not possible for rural schools because of the geographical spread of the schools. The author therefore waited for the questionnaires to be filled in at each school. Semi Structured Interviews were conducted with the Grade 6 and 9 pupils, parents and suppliers of Educational Materials. This was meant to beef up data from the questionnaires and more so to bridge the gaps that may have been left out in the questionnaires.

The Interview Schedule questions were directly related to the research questions. Therefore the questionnaires and Interview Schedules were used to collect primary data from the policy makers, implementers of the policy and beneficiaries of the EMs policy. Secondary data were obtained through documentary review from different sources. This was meant to gather data that might not have been captured by use of questionnaires.

### **3.8 Data Analysis and Interpretation**

A Statistical Package for Social Scientist Programme (SPSS) was used to calculate frequencies and cross-tabulations required for easy interpretation and analysis for quantitative data. Qualitative data which required responses

to each open-ended question in the interview schedule were read. Typical responses from the interview schedules were noted down and content analyzed to set up response categories. These response categories were assigned numerical codes and interpreted.

### **3.9 Ethical Considerations**

Nearly all research that involves human beings gives rise to ethical issues (Sim, 2000: 39). Similarly, prior to embarking on the study, the researcher had to seek authority for collecting data from appropriate officials. This was meant to clear fears and threats that subjects in the study might have in providing any information that hinge on their ethical values. The researcher was cleared through Introductory Letters that were provided by the University of Zambia, Assistant Dean of Students for Post Graduate Studies and the Provincial Education Officer for Western Province. This way subjects were assured of total confidentiality of the information they gave.

### **3.10 Difficulties Encountered During Data Collection**

During data collection, the author experienced four notable problems; Firstly, Mongu District being rural and vast, had most of the schools were scattered over long distances. The author did not have adequate financial resources to overcome this.

Secondly, it was difficult to collect data from the PEO and DEBS offices despite having given them 5 days within which to fill in the questionnaires.

The officers at the two management levels had too tight schedules to accommodate the Researcher. Some of the filled in questionnaires had to be posted because it proved costly to have them filled in whilst the Researcher was still in the field. In addition, most of the parents were reported to be out of their residences hence being unavailable for the interviews.

Thirdly, most pupils and parents had difficulties with self expression in the English Language. Some of interviews were thus, conducted in Silozi and then coded into English.

Lastly, the Sample Size and status of the respondents could not be standardized as planned. The Researcher planned to administer 10 questionnaires at each school. However, this was not the case because most of the schools did not have the required number of teachers as per each school's establishment. In such cases the researcher had to take on board the teachers available as respondents.

## CHAPTER FOUR

### RESEARCH FINDINGS

#### 4.1 The Respondents

Ninety-eight (98%) of the respondents were all from Mongu District and 2% were from Lusaka District representing the major suppliers of Educational Materials. A total of 251 respondents were involved in the study of which 117 were male and 134 were female (Table 1).

**Table 1: Respondents by gender category**

<b>S/N</b>	<b>Sex</b>	<b>No. of Respondents</b>	<b>%</b>
1	Male	117	46.6
2	Female	134	53.4
<b>Total</b>		<b>251</b>	<b>100</b>

**Note:** The majority of respondents accounting for 53.4% were female while male respondents accounted for 46.6% of the number interviewed. The breakdown of these is shown in Table 2.

**Table 2: Status of Respondents**

<b>S/N</b>	<b>Status</b>	<b>Number of Respondents</b>	<b>%</b>
1	Headteachers	11	4.3
2	Teachers	98	39.0
3	Pupils	90	35.8
4	Parents	35	13.9
5	Suppliers of EMs	8	3.2
6	Ministry Officials	9	3.6
<b>Total</b>		<b>251</b>	<b>100</b>

**Note:** This consisted of 98 teachers, 11 headteachers, 90 pupils, 35 parents, 8 EMs suppliers, 9 MoE officials (1 PEO, 1 DEBS, 1 Senior Planning Officer, and 1 Planning Officer).

#### **4.2 Textbook to Pupil Ratio**

The study showed that the Ministry's policy of 1 textbook to 2 pupils for basic schools had not yet been met in the study area. The textbook to pupil ratio in English for Lower and Upper Basic was 1:3 while at Middle Basic it stood at 1:4. In Mathematics, a similar situation was also prevalent as 3 pupils shared a textbook at Lower and Middle Basic while that for Upper Basic was 1:5. The study further revealed that 3 pupils shared a Science textbook at both Lower and middle Basic. The scenario was challenging at Upper Basic where teachers revealed that a group of 6 pupils shared one textbook. The same trend prevailed also in Social Studies where 3 pupils shared 1 textbook at Lower and Middle Basic. This information is summarized in Table 3: