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KAMPALA INTERNATIONAL UNIVERSITY

TITLE:

**BLOCK MECHANISM AND PUPILS ACADEMIC
PERFORMANCE IN SCHOOLS: CASE STUDY OF KITUMUI
PRIMARY/SECONDARY SCHOOL**

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A RESEARCH REPORT SUBMITTED TO THE INSTITUTE OF OPEN AND
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DECLARATION

I, ROTICH LINAH-DPE/21329/81/DF

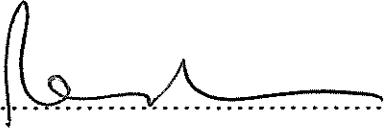
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DEDICATION

To my beloved HUSBAND for his enormous support while I studied far from home.

ACKNOWLEDGEMENT

I would like to thank the good Lord for giving me strength and courage to compile this research report. Without God, this research would not have seen the light of the day!

Special thanks go to my supervisor, Rev. Erich Kasirye who was a good mentor and advisor during the compilation of this work. My appreciation also go out to the Administration of Kampala International University for their support during this exercise.

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May the Good Lord reward you abundantly.

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List of Acronyms and Abbreviations

AEO	-	Area Education Officer
DFID	-	UK Department for International Development
DSS	-	Direct Support to Schools
EFA	-	Education For All
FPE	-	Free Primary Education
MDG	-	Millennium Development Goals
MOEST	-	Ministry Of Education Science and Technology
SMC	-	School Management Committee
SSA	-	Sub-Saharan Africa
TOR	-	Terms Of Reference
UNDP	-	United Nations Development Program
UPE	-	Universal Primary Education
VAT	-	Value Added Tax

1.0 ABSTRACT

This paper gives the results of a survey and evaluation of the Free Primary Education (FPE) program in Kenya. The FPE program started in January 2003 when a new government came to power after a general election. This was a fulfillment of one of the government's election promises.

The FPE program is implemented by the Ministry of Education, Science and Technology (MOEST) through Direct Support System. This is a system whereby the government, through the ministry gives direct financial support to primary schools through a block grant. The grant is based on pupil numbers (enrollment). Each pupil is allocated the same amount of funds per year. The allocation per pupil is then supposed to be spent on various learning materials based on guidelines spelt out by the ministry.

The survey findings indicate that in overall, the FPE program has been well received, and has generally met the overall objective of increasing pupil enrollment rates. However, its implementation has run into various challenges over the last three years.

These challenges include:

- shortage of teachers and classrooms
- inadequacy of the funds
- general lack of management skills by the head teachers to administer the program effectively
- a general decrease in education standards due to a combination of the above and other factors, especially shortage of teachers.

In addition, economic conditions, and especially poverty, are working against the program. This is because poor parents can still not afford to send their children to school due to the lack of other resources such as food and uniforms.

2.0 EXECUTIVE SUMMARY

2.1 Overview of the Terms of Reference

The overall purpose of this study was to assess the experience of Kenya as a case study of those countries that use the direct support to schools mechanism (also called the block grant mechanism). Consequently, the study was meant to document the lessons learnt from such experience.

To achieve the above purpose the Consultant was guided by the following Terms Of Reference (TOR) as given by the client:

1. The general philosophy underpinning the block grant mechanism coupled with the economic, financial, political and social justification of such an experience.
2. Characteristics of the mechanism that has been put in place to provide direct support to schools through block grants, including the amounts involved, the formula used to calculate the amount each school is entitled to and the eligibility criteria.
3. Mechanism in place to transfer resources from the ministry of Finance to school
4. Process used at the school level to determine the allocation of resources between different units, including the role of the school management committees and other communities organization
5. Accountability mechanisms that ensure public transparency of resource allocation and compliance with MOE guidelines.
6. Allocation of resources towards different eligible inputs
7. Obstacles that were encountered during implementation and ways they were overcome
8. Summary of lessons of the experience

In addition the study has also documented the impact of the elements cited above on:

9. Teaching and learning environment
10. Internal efficiency and students learning

2.2 Sampling and Methodology

The assignment was cross-sectoral and encompassed the key stakeholders in the implementation of FPE viz: the Ministry of Education, parents, teachers and local education officers in the districts sampled.

Geographically, the block grant mechanism covers all public (i.e. government-maintained) schools in the whole Republic of Kenya. The sample schools for this evaluation study were drawn from the capital city (Nairobi) and rural primary schools near the city.

The study employed a combination of methodologies. The Descriptive and Case study methods were the main approaches for the study. Through the descriptive approach, the consultant was aiming at capturing the situation as a result of the interventions

introduced by the school block grant mechanism. Data was collected primarily using face-to-face interviews where an open-ended questionnaire (based on the ToRs) was used. In addition one Focus Group Discussion was conducted with the ministry of education officials. Observations of FPE books were also made in the schools visited.

2.3 Sampling Technique

To obtain representative samples for study, non-probability sampling techniques were applied, including convenience/directed sampling and purposive /judgmental sampling.

2.4 Data Analysis

The data was analyzed using qualitative method, which involved capturing common themes and categorizing them through content analysis

2.5 Key Findings

Since the year 2003, many reforms in the education sector have been undertaken by the government, in order to address the overall goals of the national Economic Recovery Strategy Paper (ERS), as well as international development commitments. These include the Millennium Development Goals (MDGs) and Education for All (EFA). In addition, a new Sessional Paper (No 1 of 2005) on Policy Framework for Education, Training and Research has been developed.

The first major initiative of these reforms was the launch and the implementation of the free primary education (FPE) in January 2003. Through FPE, primary school fees and levies were abolished thus significantly reducing the burden on households in financing primary education.

1. Since introduction of FPE in 2003, the MOEST has organized financial management training sessions for schools head teachers. These include basic book- keeping which was to allow them manage the FPE funds effectively following the guidelines provided by the MOEST.

The MOEST offers guidelines of the recommended textbooks. To determine the requirements of each school the enrollment rate is used, which is provided by the District Education Officers(DEO) in each district.

2. The government remits the money by direct wire transfer to the school accounts held in a reputable bank in the district. Each child is allocated a maximum of Kshs 1,020 (\approx US\$ 13.60 at current exchange rate) per year. When remitting the funds the Government also issues guidelines on what should be spent per child on instructional materials, what need to be spent per child on textbooks based on the recommended prices of the textbooks and also what needs to be spent per child on the extra curriculum activities. Each primary school is required to open two accounts: one for **Instructional Materials** (in which Kshs 650, equivalent to 63.7%, goes) and the other for **General Purposes** (Kshs 370 equivalent to 37.3%).

It's the responsibility of the School Management Committee (SMC) to manage the funds once they are wired into the school accounts, especially in terms of giving out tenders for the supply of the various learning materials.

Table 2.1: Primary Education Budget (Kshs billion)

FY	Recurrent	Devt.	Total	As % of Total Educ. Budget
1999/2000	0.483	62.97%	0.284	37.03%
2000/2001	0.816	77.57%	0.236	22.43%
2001/2002	0.742	83.18%	0.150	16.82%
2002/2003	3.320	80.66%	0.796	19.34%
2003/2004	5.970	50.67%	5.813	49.33%
Cumulative Totals	11.331	60.89%	7.279	39.11%
			18.610	6.18%

Note: Huge increase in development budget in 2003/2004 is due to FPE (which started in January 2003)

Source: Ministry of Education, Science and Technology (www.education.go.ke)

3. From the study, it was found that generally head teachers follow the laid down guidelines, but in some cases they interfered with different votes especially when the disbursement was done late.

District Education Officers through Area Education Officers are supposed to monitor the management of all the schools, including the usage of funds. In addition officers from MOEST also sample and visit schools for random inspection on how they are utilizing the FPE funds.

4. MOEST FPE accounts are also audited annually by external auditors (Controller and Auditor General). In addition the Government has on board two consultants; price water house coopers for assisting the Government on expenditure tracking and Ernest and Young which also act as external auditors to the free primary funds.

2.6 Key challenges encountered in implementation of FPE

1. The ability of the government to maintain the positive trends in education is held back in particular by severe budgetary constraints, weak capacity, and the HIV/AIDS pandemic. The pandemic will have an increasingly negative impact on education, as HIV-infected teachers become ill (increasing absenteeism and impairing their effectiveness) and die (reducing teacher supply), and through the rapid increase in orphans. Apart from the human suffering, this will substantially increase the costs associated with FPE. The problem is compounded by country's failure to integrate effectively HIV/AIDS prevention measures in the education curriculum.

Challenges in the implementation of Free Primary Education

2. Increased student numbers, leading to shortage of teachers. Teacher shortage has dogged the education sector (and especially the primary schools) since mid 1990, when the government froze new recruitments under the World Bank-inspired Structural Adjustment Program (SAP). In the last five years, the government has only been replacing those who die, retire or resign from the government service. The problem became more acute after introduction of FPE in January 2003. Despite the additional over 1 million pupils, the teacher numbers have remained at around 235,000.
3. There is also a lack of clear guidelines on admissions, lack of consultation with head teachers and parents, delay in remittance of funds and expanded roles for head teachers, without corresponding increase in compensation.
4. Severe shortage of classrooms, teachers and facilities, due to an unexpected 1 million additional pupils who were previously out-of-school, and who turned up to attend classes in response to the government's call. In many schools, the classroom sizes, especially in the lower classes, have risen from an average of 40 pupils per class to 120 pupils per class.
5. Lack of management skills among head teachers and School Management Committees (SMCs). When a teacher is promoted to be a school head teacher, in most cases such a teacher does not undergo any additional training to prepare him for the management role. He thus learns on the job (more like trial and error). The same case applies to members of the SMCs (especially in the rural areas), who in most cases are illiterate villagers.
6. Political interference is another thorny issue in schools as some politicians sometimes demand that head teachers in schools within their localities be of their choice (and preferably from their community). Such politicians hope to gain support from the influence of the head teachers. Thus when a head teacher from another locality or community is posted to a school, he may not be as effective as he would have wished due to constant interference by the local politicians (including inciting the parents or the community against such a head teacher).
7. When the FPE program was introduced, the increase in pupil numbers led to congested classes in most schools. This in turn reduced the efficiency of learning as the teachers would no longer have the same level of personal interaction with the pupils. The teacher:pupil ratio in some schools, especially in urban areas went as high as 1:120, much above the recommended ratio of 1:40 by the MOEST.
8. Some Area Education Officers (AEOs), Inspectors and Auditors who are supposed to visit schools regularly within their jurisdiction lacks assistants and also means of transport. This reduces their efficiency, which in turn affects the effective implementation of FPE.
9. Delays in the disbursement of the funds was also cited as another challenge, which affects the implementation of FPE. This has been attributed to the slow

pace of fund disbursement by the Ministry of Finance, as well as to logistical issues, such as directing the funds to wrong account numbers.

2.7 Conclusion and Summary of Lessons

A number of lessons can be drawn from the implementation of FPE in Kenya.

- (i) For successful implementation of such a program, early and good planning is important, which requires factoring in critical issues, including the training of school heads, their deputies and SMCs on the management of funds; sensitization of parents on their role; requirements for additional teachers and classrooms, etc. The FPE was introduced in January 2003 (in the middle of the Financial Year) in a very sudden manner, which looked as if the government was simply rewarding the people for voting it in. The new government, like its predecessor, did not carry out a situation analysis prior to the implementation of FPE.
- (ii) However, the FPE is still a good program, which has gone a long way in achieving the goals of UPE. In subsequent Financial Years , the Government has managed to do proper budgeting for the program, and to disburse funds on time most of the time. Donor assistance has also come in to supplement the government budget, especially in the provision of learning materials.
- (iii) Overcrowded classes still persists as construction of additional classrooms is not keeping pace with the increase in pupil numbers.
- (iv) The money given for FPE per pupil per year for teaching and reading materials and other expenses is not enough and, therefore, the government should explore ways and means to get more financial resources. Money allocated for maintenance (including electricity, water, repairs, etc.) should also be increased.
- (v) School inspectors and Auditors should be visiting schools more often and should offer guidance to SMCs and head teachers on a continuous basis. It is, therefore, imperative for the MOEST to increase its capacity in this area.
- (vi) The government should address the issue of sustainability of the FPE program as well as quality assurance and maintenance of standards. In this regard, the issue of adequacy of teachers and classrooms should be looked into.

3. 0 INTRODUCTION

3.1 Preamble

This report presents the findings of the evaluation of the lessons and experience with the direct support to schools (DSS) system in Kenya as a result of using block grant mechanism.

The FPE, which came in effect in January 2003 when a new government came into power, was meant to ensure that all school-age children in Kenya receive at least basic education. In this regard, therefore, the government abolished various school levies, which had been identified as being major determinants to high school dropout rates. Under the program, the government undertook to provide funds for teaching, instructional materials and co-curriculum activities.

3.2 Background of the Study

The theme of quality improvement in education was developed at the 2003 ADEA Biennale to address crucial issues: concepts of quality, policies for equity, supporting framework for decision-making and monitoring, funding of quality and essential inputs, adjusting of curricula and the use of African languages, strategies for competent teachers and effective schools, the decentralization and diversification of the education provision, health/AIDs and quality. Over and above the objectives of reinforcement of shared understanding and mutual learning, the major goals and challenges are clearly set out: –

- To foster a culture of quality among the main actors and partners involved in the development of education in Africa.
- To provide them with a framework including concepts, policies, strategies, methodologies and effective and operational tools for implementation.
- To facilitate ways in which the lessons learned at international and/or regional level can be applied to national contexts, where the action actually takes place.

For the next biennial meeting scheduled for January 2006 ADEA wants to explore further the way the process of change and reform play out at the school level. An important element is the changes that are taking place in Sub-Saharan Africa (SSA) in respect of the way education is financed and managed

Increasingly, schools are encouraged to take responsibility for improvement in teaching and learning, while the responsibility for management of all or part of the non-salary resources is delegated to the school level. Countries such as Kenya, Uganda, Tanzania and Mozambique are providing block grants to schools based on a funding formula that is largely based on students' enrolments. School level administrators, usually together with School Management Committee (SMC) members decide on the allocation of these resources to different inputs in the education process within guidelines defined by the ministry of education. These processes are typically accompanied by mechanism to ensure public accountability for the use of the resources.

3.3 Purpose of the Study

The purpose of the study was to document the lessons of the experience of Kenya with the direct support system of funding schools using the block grant mechanism.

To achieve the above purpose the Consultant was guided by the following Terms Of Reference (TORs):

“Challenges Faced by the Researchers in Implementing the FPE through Block Grants”

1. The general philosophy underpinning the block grant mechanism coupled with the economic, financial, political and social justification of such an experience.
2. Characteristics of the mechanism that has been put in place to provide direct support to schools through block grants, including the amounts involved, the formula used to calculate the amount each school is entitled to and the eligibility criteria.
3. Mechanism in place to transfer resources from the ministry of Finance to school
4. Process used at the school level to determine the allocation of the resources between different units, including the role of the school management committees and other communities organization
5. Accountability mechanisms that ensure public transparency of resource allocation and compliance with MOE guidelines.
6. Allocation of resources towards different eligible inputs
7. Obstacles that were encountered during implementation and ways they were overcome
8. Summary of lessons of the experience

In addition the study was also to document the impact of the elements cited above on:

9. Teaching and learning environment
10. Internal efficiency and students learning

3.4 Scope of the Work

The assignment was cross-sectoral and encompassed the key stakeholders in the implementation of FPE viz: the Ministry of Education, parents, teachers and education administrators at the local level.

3.5. Logistical Challenges to the Conduct of the Study

In conducting this study, a number of challenges were encountered, including:

1. **Time Constraint** – The time allocated was a bit squeezed especially in terms of getting appointments with all the relevant respondents, given that December is usually a festive period.
2. **Non-Availability of Some of the Respondents** – As noted above, December being a festive month, a number of the envisaged respondents were already out of the office, and replacements had to be sought.
3. **Attitudes Towards the Exercise** – Some respondents were unwilling to freely share the information (especially negative information). This was mainly true at the local level because of fear of not knowing whether the information could go to their superiors with negative repercussions.

Nevertheless, the researcher overcame these limitations and collected sufficient and representative data to reach the conclusions that were made.

4.0 METHODOLOGY

4.1 Overall Study Design.

The study employed a combination of methodologies, as was necessary. The Study was mainly Descriptive in nature. Interview and Observation were the main data collection methods used. An open-ended Questionnaire was used in the interviews, and secondary data (statistics, policies, etc.) was collected from published reports provided by the Ministry of Education, Science and Technology (MOEST).

4.2 Sampling Design

The block grant mechanism covers all public primary schools in the Republic of Kenya. However, the sample for this study was drawn from the capital city (Nairobi) and neighboring rural primary schools. To obtain a representative sample for the study, non-probability sampling techniques were applied, including:

- ❖ Convenience/directed sampling;
- ❖ Purposive /judgmental sampling; and
- ❖ Snowballing.

Table 4.1: Overall Sample Size

	Component	Number of Respondents
1.	MOEST	5
2.	Primary Head Teachers	4
3.	Parents in SMCs	2
4.	Primary Teachers	3
5.	Local Education Officers	1
	Total	15

Source: Author

Table 4.2: Locality of Schools

	Frequency	Percent
Urban	4	40.0
Rural	6	60.0
Total	10	100.0

Source: Author

4.3 Literature Review

A number of relevant publications and documents were reviewed, including Government Policy Papers, Conference Proceedings, Training Manuals, Legislative Documents, Research Reports, etc.

4.4 Data Analysis

The data collected was analyzed using descriptive statistics, use of tables and charts.

5.0 FINDINGS

5.1 Rationale and Philosophy for FPE

Although it is very costly for a country to provide FPE to all its school going children, it is a worth investment because human capital capacity building is the basis for any country's long-term economic development. According to the Kenya Government's Sessional Paper No.1 of 2005 (on Policy Framework for Education, Training and Research), the national policy on primary education was to achieve UPE by 2005, as part of the strategy towards attaining the overall EFA goal by 2015 (under the Millennium Development Goals – MDGs). Attaining UPE will ensure that all Kenya children eligible for primary schooling have opportunity to enroll and remain in school, to learn and acquire quality basic education and skills training. In pursuit of this policy objective, the Government introduced FPE in January 2003, which resulted in an increased enrolment of children, from 6.1 million in 2002 to 7.2-million in formal schools (both public and private) by the end of 2003. This is an increase of 17.6%. Another 300,000 primary school-age children were enrolled in non-formal learning centers. The increase in public schools alone was 15.7% over the same period.

Table 5.1: Primary School Enrolment by Gender, 1999 - 2003

Total National Primary Schools Enrollment ('000)

	1999 Boys	1999 Girls	2000 Boys	2000 Girls	2001 Boys	2001 Girls	2002 Boys	2002 Girls	2003 Boys	2003 Girls
Gender										
Totals	3,082.1	2,982.0	3,046.5	3,013.4	3,079.6	3,002.1	3,143.1	2,988.0	3,702.8	3,505.4
Grand Totals		6,064.1		6,059.9		6,081.7		6,131.1		7,208.2
% Change Y-to-Y	-		-0.07%		0.36%		0.81%		17.57%	

Public Primary Schools Enrollment ('000)

	1999 Boys	1999 Girls	2000 Boys	2000 Girls	2001 Boys	2001 Girls	2002 Boys	2002 Girls	2003 Boys	2003 Girls
Gender										
Totals	2,994.6	2,925.2	2,993.1	2,874.6	2,978.1	2,904.5	3,060.2	2,908.1	3,556.6	3,349.8
Grand Totals		5,919.8		5,867.7		5,882.6		5,968.3		6,906.4
% Change Y-to-Y	-		-0.88%		0.25%		1.46%		15.72%	

Source: MOEST (www.education.go.ke)

Education for All: The Right of Every Child to Education Through Free & Compulsory Education

The declaration of FPE in January 2003 was in recognition of education as a basic right of all Kenyan children as articulated in the Children's Act (2001). The launching of FPE was initially marred by confusion and lack of clear direction. As a result, an FPE Task Force was set up to assist the government in developing appropriate responses to the challenges encountered. The Task Force was also mandated to identify immediate and long-term issues on the implementation of the FPE and to recommendations regarding the following issues:

- ❖ Special classes for average children;
- ❖ Review of methods used in delivery of education and distribution of textbooks and school equipments in order to increase efficiency and reduce cost;
- ❖ Class sizes – to be increased from 40 to 50
- ❖ Ownership of school assets (including land) – Schools to be issued with Title Deeds to protect them from loss of their land to un-authorized persons ("land grabbing");
- ❖ Taxation of educational materials – Lowering of VAT on all educational materials and tax exemption of donations and contributions towards FPE;
- ❖ Textbook Ratios – Proposed textbooks ratio as 1:3 on lower primary and 1:2 in upper classes.

From the responses obtained, most of the head teachers interviewed felt that FPE was a good idea, as it has given a chance to many pupils who would, otherwise, have been out of school. It has also allowed some adults who did not have a chance at their young age to go to school to be enrolled (the oldest being 84 years old).

However, the FPE program has encountered several challenges, thus affecting the performance of the pupils. This has been seen from the recent trends in the primary leaving examination results, with a decline of pupils' performance in public schools compared to private schools.

5.1.1 Independence Philosophy on Education

Since independence in 1963, the Government of Kenya has had a commitment to expand the education system to enable greater access to the population. This has been in response to a number of concerns, among them the desire to combat ignorance, disease and poverty; and the belief that every Kenyan child has the right of access to basic welfare provisions, including education. Thus the government undertook the obligation to provide its citizens with the educational opportunity in order to take part fully in the socio-economic and political development of the country and to attain a decent standard of living.

The policy of the Kenya government to achieve Universal Primary Education (UPE) has to be seen within the wider international context. The Universal Declaration of Human Rights, adopted in 1948, states that "*everyone has a right to education*". The World Conference on Education for All (EFA) held in Jomtien, Thailand in 1990, sparked off a new impetus towards basic education. It noted, "*that to serve the basic needs for all, requires more than a recommitment to basic education as now exists. What is needed is an expanded vision that surpasses resource levels, institutional structures, curricula and conventional delivery systems, while building on the best in the practices*".

The Amman Mid-Decade Review of Education for All (1996) reaffirmed the commitment to the Jomtien resolutions. It observed that the provision of basic education, especially for girls, has remained elusive in many less industrialized countries. This was said to be particularly so in Africa, where ethnic tensions and conflicts have displaced many households, thus denying children opportunities of going to school. The Dakar Conference of 2000 reviewed developments in achieving UPE in the African continent. It set as one of the EFA goals "*eliminating gender disparities in primary and secondary education by 2005, and achieving gender equality in education by 2015*". This was further endorsed by the Millennium Development Goals (MDG). Among other things they set targets "*to ensure that, by 2015, children everywhere, boys and girls alike, will be able to complete a full course of primary schooling*".

Within this broad policy framework, the expansion of learning institutions has been one of the greatest achievements in the education sector since independence in 1963. Kenya has achieved an impressive increase in adult literacy. The achievements in literacy have reflected the country's impressive progress in expanding access to education during the last four decades largely by establishing a comprehensive network of schools throughout the country. The substantial expansion of education has generally resulted in an increased participation by groups that previously had little or no access to schooling. Enrolment of a greater percentage of girls and indeed the attainment of Universal Primary Education (UPE) has been the long-term objective in the primary education sub-sector, since 1974 when the first FPE program was announced by the government. However, numerous problems have bedeviled various interventions over the years.

5.1.2 The Free Primary Education Declaration of the 1970s

At independence in 1963, the government committed itself to offering a minimum of seven years of free primary education. This was re-echoed over subsequent years culminating in a 1971 presidential decree abolishing tuition fees for the districts with unfavourable geographical conditions, since these were said to make the populations in these areas poor. A second presidential decree on the 10th independence anniversary (973) provided free education for children in lower primary classes (i.e. one to four) throughout the country. It went further to provide a uniform fee structure for those in upper primary classes (five to seven).

The aim of the free primary education program was to provide more schooling opportunities, especially for the poor communities. The argument was that the payment of school fees tended to prevent a large proportion of the children from attending school.

However, the presidential decree of 1973 was made on political grounds, without close scrutiny of its financial implications, as well as the various methods for its implementation. In January 1974, the Ministry of Education had to rethink its priorities in order to cope with the staggering rise of pupil enrolment. Enrolment in class one rose by a million above the estimated figure of about 400,000.

The total enrolment figure for classes one to six increased from 1.8 million in 1973 to nearly 2.8 million in January 1974.

At the time of the abolition of school fees no counter measures were announced about how to replace the lost revenue. Initially, primary schools were at a loss as to what they could do about this lost revenue, and after failing to get clear directives, school management committees resorted to raising school revenue under the guise of a "building levies." Ostensibly this was aimed at putting up new facilities. With the enlarged enrolment, a countrywide building program had to be launched to cope with extra classes. Many schools were not aware of the number of new classrooms required.. In some schools as many as five extra streams came into being. The building levy varied from one district to another, but in most cases, it turned out to be higher than the school fees charged prior to the decree. This frustrated many parents who had little alternative but to withdraw their children from school once again. Thus, enrolments, even in districts that had experienced large infusions of new children, reverted to the situation before 1973.

The high drop out rates was a response, not only to the very high levies, but also to the quality of education that was being offered following the government intervention. As a result of high enrolments, there was overcrowding in classes and the supply of teaching and learning materials underwent a severe strain. Since the early 1970s the distribution of learning materials had been centralized through the Kenya School Equipment Scheme (KSES). It now became difficult to dispatch the necessary materials and equipment to most of the primary schools. Distribution problems were compounded by the variety of the topography and the long distances. Consequently, many of the schools went without basic teaching and learning materials. Eventually the KSES also died out in the 1980s.

With regard to the number of teachers at the time of the pronouncement, the country was already short of enough trained teachers. In 1973, the teaching force stood at 56,000 teachers, out of whom 12,600 (25%) were untrained. In 1974, an additional 25,000 teachers were needed for the new classes. The government was thus forced to hire more untrained teachers and by 1975, the number of untrained teachers stood at 40,000 out of a teaching force of 90,000 teachers (45%).

In the late 1980s into the 1990s, with the introduction of Structural Adjustment Programs as advised by the World Bank and IMF, the education sector became one of the hardest hit. This was especially in the area of teacher recruitment, which has been frozen since 1998.

5.2 The Free Primary Education Intervention of 2003

During the 2002 general elections, the National Rainbow Coalition (NARC) made the provision of free primary education part of its election manifesto. Following its victory, it launched the Free Primary Education (FPE) program in January 2003. Tuition fees and other levies were abolished, with the government committing to meet the cost of basic teaching and learning materials, as well as wages for critical non-teaching staff and co-curricular activities. This was in addition to the normal cost of teachers' salaries. The cost of the FPE program was estimated at Kshs 1,020 per child per year.

Parents and communities were, however, free to contribute to development facilities. However, school head teachers and SMCs had to obtain approval from the MOEST

*South Africa Biannual Monitoring Report on the Expenditure of各省 2003/2004 Report to the
Ministry of Education*

before any additional levies were imposed. This request had to be sent to the District Education Board by the Area Education Officer, after a consensus among parents, a fairly lengthy and tedious process.

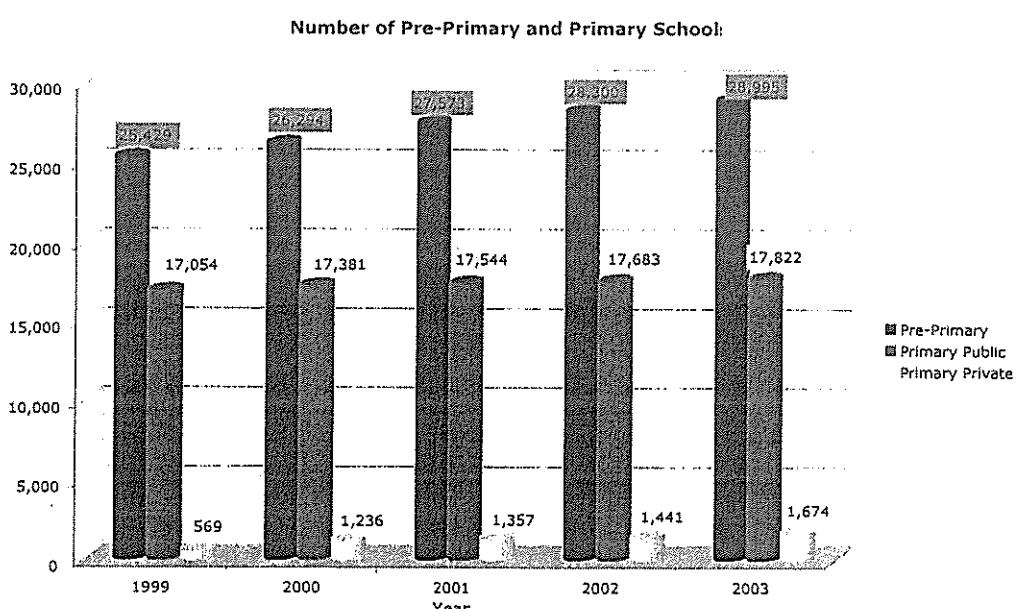
As at the launch of the FPE program, the number of primary schools in the country had increased steadily from 14,864 in 1990 to 19,496 in 2003 representing a 31.2% increase. Between 1999 and 2003, the number had increased by 10.6%, with an average annual increase of 3.33%.

Table 5.2: Number of Pre-Primary and Primary Schools

Category	1999	2000	2001	2002	2003
Pre-Primary	25,429	26,294	27,573	28,300	28,995
Primary: Public (% of Total)	17,054 96.77%	17,381 93.36%	17,544 92.82%	17,683 92.46%	17,822 91.41%
Primary:Private (% of Total)	569 3.23%	1,236 6.64%	1,357 7.18%	1,441 7.54%	1,674 8.59%
Total Primary Schools	17,623	18,617	18,901	19,124	19,496
% Increase (Y-to-Y)	-	5.64%	1.53%	1.18%	1.95%

Source: MOEST (www.education.go.ke)

Figure 5.1: Number of Pre-Primary and Primary Schools



Source: MOEST (www.education.go.ke)

Enrolment in absolute terms also went up from 6.06 million in 1999 to 7.21 million in 2003, being a rise of 18.87%. Most of the increase happened in 2003 due to the FPE,

when 1 million more pupils joined school. This was a 17.6% increase over 2002. (Table 5.1)

The proportion of girls in total pupil number has however, remained almost unchanged. In 1999, girls accounted for 49.2% of total enrollment¹, while in 2003 they accounted for 48.6% (Table 5.1).

However, primary school Net Enrolment Ratios (NERs) show wide regional disparities in gender balance. For instance, in the North Eastern Province (mainly inhabited by pastoralist communities), boys constitute 16.5% and girls 9.8%, with an average of 13.4% for the province.

While free primary education increased participation, it at the same time created a number of challenges. For instance, it has exacerbated the problem of teaching and learning facilities. As a result of the high influx of new pupils, classrooms are congested. Many SMCs feel that they are seriously constrained to improve the state of learning facilities due to the government's ban on any additional school levies. At the same time, conditions laid down to request for approvals to institute new levies are so cumbersome that they hesitate to embark on the process.

The current cost of FPE is way beyond the normal education budget allocation. It is also a fact that the country's economy has not been performing well in recent years and cannot support the realization of the UPE goals without the infusion of outside funds. For the country to sustain universal access, there will be, therefore, a need for accelerated economic growth to generate public funds for education. Otherwise, prioritizing UPE is most likely to take away from the provision for other sectors of education as well as from other social sectors, such as health.

5.3 Characteristics of the mechanisms that has been put in place to provide direct support to schools through block grants

5.3.1 Funding Trends

The government, in the financial year 2005/6, did not factor in its annual budget any money from the donor countries. However, a number of donor countries and agencies (especially the DFID), have pledged continued support for the FPE.

In the 2003/04 financial year, the Government increased its education budget by Kshs 13.82 billion (equivalent to a 20.8% increase) to Kshs80.23 billion over the previous financial year. Of this amount, over Kshs 7.6 billion was specifically allocated to the FPE program. The donor community, which received the FPE policy with high enthusiasm, was quick to assist the government. The World Bank, for example, gave a grant of Kshs 3.7 billion, while the British government through the DFID gave Kshs 1.6 billion. Other donors included the Organization of Petroleum Exporting Countries (OPEC, Kshs 1.2 billion), the Swedish government (Kshs 430 million) and UNICEF (Kshs 250 million). It goes without saying that such donor funding is usually temporary.

Table 5.3: Education Budget Trends

1. Overall Education Budget (Kshs billion)

FY	Recurrent	% of Total	Development	% of Total	Total
1999/2000	47.60	98.63%	0.66	1.37%	48.26
2000/2001	48.71	97.81%	1.09	2.19%	49.80
2001/2002	53.74	95.39%	2.60	4.61%	56.34
2002/2003	61.60	92.76%	4.81	7.24%	66.41
2003/2004	71.80	89.49%	8.43	10.51%	80.23
Cumulative Totals	283.45	94.16%	17.59	5.84%	301.04

2. Primary Education Budget (Kshs billion)

FY	Recurrent	% of Total	Development	% of Total	Total	% of Total Educ. Budget
1999/2000	0.483	62.97%	0.284	37.03%	0.767	1.59%
2000/2001	0.816	77.57%	0.236	22.43%	1.052	2.11%
2001/2002	0.742	83.18%	0.150	16.82%	0.892	1.58%
2002/2003	3.320	80.66%	0.796	19.34%	4.116	6.20%
2003/2004	5.970	50.67%	5.813	49.33%	11.783	14.69%
Cumulative Totals	11.331	60.89%	7.279	39.11%	18.610	6.18%

Note: Huge increase in development budget in 2003/2004 due to the introduction of FPE (which started in January 2003)

Source: MOEST (www.education.go.ke)

5.3.2 Implementation Mechanisms

The MOEST, as the implementing of the FPE program, offers guidelines to the schools head teachers on the usage of the funds, as well as on the recommended textbooks. To determine the requirement of each school the ministry uses the enrollment rates, which are provided by the District Education Officers (DEOs). This enables the ministry to work out the funding requirements of each school based on the enrolment rate. As has been mentioned in earlier sections of this report, the MOEST has set the maximum amount for each pupil at Kshs 1020 per year. However, this method tends to assume that the cost of living in all parts of the country is similar and thus would tend to disadvantage the urban schools and schools with low enrolment rates. Hence, some head teachers have been found to be inflating the enrolment rates in order to get more funds.

5.4 Transfer and Management of the Financial Resources

Since introduction of FPE the ministry of education has organized financial management training sessions for head teachers, to equip them to manage the FPE funds efficiently and effectively. These sessions have covered such issues as basic bookkeeping. However, all the teachers interviewed were of the view that the training was not adequate. Further, they acknowledged that management of the FPE funds still remains a nightmare and most of the times auditors do not find well-prepared records whenever they visit the schools for audit.

Once the ministry has calculated the financial requirements of each school, and prepared the payment schedules, it confirms the school account details with the District Education Officers (DEOs) from each district. After all the necessary checks are found to be okay the government then send the money by direct wire transfer to each school account.

As noted before, when remitting the funds the Government also issues guidelines on what should be spent per child on instructional materials, what needs to be spent on text books based on the recommended prices, and also what needs to be spent on the co-curriculum activities.

Broadly, the Kshs 1020 per child per year is divided into two parts:

- (i) Kshs 650 (63.7%) is to be used to purchase educational materials, including:
 - textbooks
 - exercise books
 - pens
 - charts and wall maps
 - registers
- (ii) Kshs 370 (36.3%) is to support school operations, including:
 - support staff wages
 - repairs and maintenance
 - electricity and water bills
 - communications (postage, telephone, etc.)

The two parts are supposed to be banked in separate accounts.

5.5 Management of FPE Funds at School Level

It is the responsibility of the SMC to manage the funds once they are received in the school accounts. The SMC is composed of the following members:

- (i) The Head Teacher – Chair of the SMC
- (ii) The Chairperson of the PTA
- (iii) The Deputy Head Teacher – Secretary to the SMC
- (iv) Two parents elected by other parents but not members of the PTA
- (v) One teacher from every class

The duties and mandate of the SMC include:

*Budgetary Management Meeting - 1st November 2018, Ministry of Education, Sri Lanka - School
Textbook Grant Mechanism*

- ❖ Procurement of the necessary materials on the basis of the given procurement guidelines from MOEST.
- ❖ Deciding on priorities of the school based on the maximum amount allocated for each vote by MOEST. For any monies they may want to spend on different item outside the specified vote (e.g. in rural schools which are given money for electricity which doesn't exist in some rural schools), then the SMC must send a request to the District Education Board with their proposed budget for approval.
- ❖ Conduct pre-qualification process for booksellers and other service providers.
- ❖ Conduct tendering and award of contracts for the materials and services required. No less than 5 bidders are required before any award of tender.
- ❖ After a supplier has been selected, an agreement is signed. For instance, a book supplier has to adhere to the recommended prices. The SMC may negotiate for a discount, which is ploughed back as extra books. The MOEST clearly stipulates that there should not be any discount in form of cash.
- ❖ Delivery of the books or other materials is supposed to be during daytime and in presence of the two parents (members of the SMC) and one other member of the SMC.
- ❖ If the members are satisfied with the items, then the head teacher is allowed to make payment (together with the other signatories). All payments should be accompanied by the necessary documents. The MOEST does not allow for cash payments. Thus all payments should be through cheque
- ❖ All materials bought under the FPE funds should be clearly stated so and then entered into the inventory of the school.

5.6 Comparison of the FPE Procurement Procedures with Previous Procedures

Prior to the introduction of the FPE program, head teachers used to send the textbooks needs of their schools to the DEO who was supposed to compile the list within his/her area and forward it to MOEST. After receiving the entire list from all the DEOs, the MOEST would then budget for the books and then channel the funds through each DEO. The DEO was then supposed to procure books for the schools within his/her district. Most of the time a school used to get less than what it had requested and in other times could get no books at all depending on the budgetary position and priorities of the ministry.

5.7 Accountability of FPE Funds

Since most of the head teachers have been trained on the management of the funds, they are supposed to keep up to date records of the expenditures. However due to the increased responsibilities on their part as head teacher who are supposed to manage the funds, teach, attend to visitors of the schools and also attend education seminars

*and other meetings they rarely meet the datelines set by the MEOEST of
submitting their returns on expenditure in time. Most of the times when the schools
auditors visit the schools for auditing they are only given raw done which in turn also
complicates the work.*

District Education Officers through Area Education Officers are supposed to monitor all the schools. In addition officers from MEOST also sample and visit schools for inspection on how they are utilizing the FPE funds.

External auditors; Controller and Auditor General audits Ministry of Education Science and Technology Free Primary Education accounts annually. In addition the Government has on board two consultants; Price Water House Coopers for assisting the Government on expenditure tracking and Ernest and Young, which also act as external auditors to the free primary funds.

Table 5.4: Summary of Key Issues in the Management of FPE Funds

Issue	Response	No. of Respondents	%	Response	No. of Respondents	%
Timely Receipt of Funds	Yes	10	100%	No	0	0%
Frequency of Receipts per Year	Once	0	0%	Twice	10	100%
Provision of Guidelines Required	Yes	10	100%	No	0	0%
Training Adequacy of Training Regular	Yes	10	100%	No	0	0%
Accountability for the Funds	Yes	0	0%	No	10	100%
<i>Source: Field Data</i>						

5.8 Implementation Challenges

Kenya's development challenges have, for a long time, been poverty, ignorance and disease. Additional challenges have been identified as HIV/AIDS and globalization. According to the current National Development Plan (2003-2008), the development goals include the implementation of the eight Millennium Development Goals, among which is to "achieve universal primary education" It is against this backdrop that the FPE program is being implemented.

It is well appreciated that education has the capacity to improve the quality of life and to develop the intellectual capacity of a nation, which is a most valuable resource. This is particularly important at this particular moment in time, when Kenya aims to position itself strategically in order to take advantage of new trade, business and investment opportunities. The country aims to achieve sustainable economic growth and poverty reduction, through effective management. It will be increasingly

important for the Kenyan work force to be literate, numerate, trainable, skilled and flexible, so as to effectively participate in nation building and seize the opportunities globalization presents.

Prior to the implementation of the FPE, the rates of enrolment at the primary level were below 50%. Much as enrolment rates soared after the government's declaration of this program, there are still cases of some children not attending school. This prompted the government to declare that any parents not sending their children to school, for whatever reason, would be prosecuted. However, this noble policy idea has not been smooth sailing, it has been encountered by several challenges as explained below:

5.8.1 Macroeconomic Challenges

- (i) Persistent poverty is one of the major constraints to school enrollment and attendance. According to the 2003 UNDP Human Development Report, the standards of living in Kenya have generally decreased, with the poor becoming poorer. Officially 56% of the Kenyan population is classified as living below the poverty line. This means some of the poor parents cannot afford to provide the additional inputs required to sustain the children in school. These include school uniforms, food and sanitary items (for girls). In addition, poverty is known to breed hunger and malnutrition. Hungry and malnourished children have reduced capacities to learn. These children have been shown to perform poorly in school, and the dropout rate among such a group is quite high.
- (ii) The enrollment of girls continues to lag behind that of boys for a variety of reasons. These include continued socio-cultural perception that it is better to educate a boy than a girl. In addition, a girl may be required to stay out of school so as to care for younger siblings, especially those orphaned by HIV/AIDS. Even among some communities, there is evidence of boys staying out of school to herd cattle.
- (iii) The ability of the government to maintain the recent positive trends in education is held back in particular by severe budgetary constraints, weak capacity, and the HIV/AIDS pandemic. The pandemic will continue having an increasingly negative impact on education, as HIV-infected teachers become ill (increasing absenteeism and impairing their effectiveness) and die (reducing teacher supply), in addition to the rapid increase in orphaned children.
- (iv) Domestic resource mobilization is still low. Education expenditures already figure prominently in a highly constrained public budget, and the country, like most low-income countries, has only a modest scope for additional domestic resource mobilization or for reallocation within or across sectors. That said, additional domestic resources will be required if sharply increased aid dependency is to be avoided.

5.8.2 Management and Logistical Challenges

Challenges facing the implementation of the FPE program

- (i) Even and equitable distribution of teachers among the country's schools is still a major challenge for the government. This critical in order to ensure quality of education in all schools on an equal footing.
- (ii) Increased student numbers coupled with shortage of teachers; lack of clear guidelines on admission; lack of consultation with teachers and parents; delay in disbursement of the funds and expanded roles for head teachers were also cited as some of the major challenges attending to the implementation of the FPE program.
- (iii) Severe shortage of classrooms and sanitary facilities. At the start of the FPE program, in many schools, the classroom sizes, especially in the lower classes, rose from an average of 40 pupils per class to 120. As a result, some schools instituted double shifts, with morning and afternoon sessions. However, this has not alleviated the problem fully. To make more room, some schools decided to throw out the desks and chairs and seat the children on mats provided by the United Nations Children's Fund.
- (iv) Even with the financial management courses that the head teachers were taken through, most of them were encountering financial matters for the first time. Hence, their capacity to fully absorb and internalize the issues was limited. It has been a practice that when a teacher is promoted to be head teacher, such a teacher is not normally taken through any management course. They thus end up learning on the job – more of trial and error method. It is, therefore, recognized that training is crucial, especially with the increased role school heads play in the implementation of the FPE program. The head teachers interviewed were of the opinion that training on schools funds management is very important since they have been reduced to accounts clerk and yet they are expected to teach and manage schools. Such is the fear of failure that when the FPE program was launched, some head teachers chose to step down and be classroom teachers for lack of financial management skills. They feared that failing to manage the funds as required would jeopardize their jobs. Lack of proper skills among the head teachers impact negatively on their ability to draw the annual school budget using the government guidelines, especially as the number of pupils kept fluctuating and keeping up to date financial records.
- (v) Political interference is another thorny issue in the schools as most politicians demand that head teachers working in schools within their constituencies be of their choice (and preferably from their local community), notwithstanding the performance of such a teacher. Although this is not unique to the FPE program, it is still a major challenge to the program.
- (vi) Understaffing brought about by the FPE program has also led to other problems, including adequacy of management and supervision of the curriculum activities and lack of remedial teaching for weak pupils.
- (vii) The management of stakeholder interests, especially the community around the school is also another challenge. Teachers report that working with the SMC members has not always been easy as some of the members are reported

2.4.1.4. Challenges faced by SMCs during FPE implementation

to be un-cooperative and ready to incite and cause chaos. This is especially so when it comes to procurement issues.

- (viii) Some Area Education Officers (AEOs) and inspectors who are supposed to visit schools regularly within their jurisdiction lack assistants and also means of transports. This complicates their work, which in turn affects the implementation of the FPE program.
- (ix) SMC members also need training and motivation, as some are peasant farmers who have to leave their farming activities to attend to school matters.

5.9 Impact of FPE on Efficiency of Learning and the Learning Environment

5.9.1 Learning and Teacher Performance

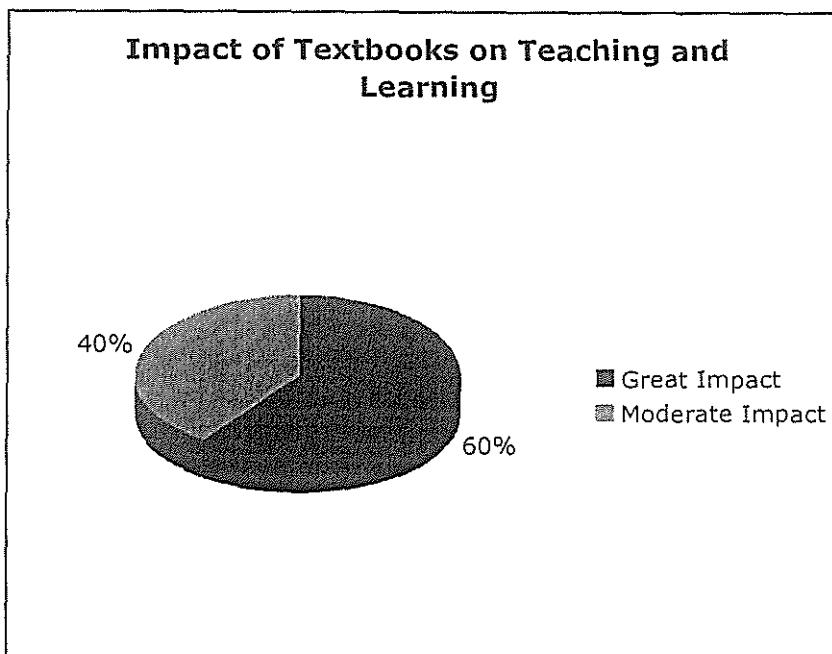
Efficiency of learning has not gone unaffected. As already noted above, when the FPE program started the increase in pupils congested classes. This reduced the teacher-pupil interaction, as the ratio between teachers and pupils in some schools, especially in urban areas went as high as 1:120, much above the recommended ratio of 1:40. This has also affected the evaluation of pupils.

Thus, teachers are unable to give personalized attention to their pupils, as well as assess their performance regularly as required ministry guidelines. In addition the teachers are unable to mark assignments on a regular basis. This means that the teacher is not having contact with his pupils so as to notice their weaknesses.

As a result of understaffing, some SMCs would have liked to recruit extra teachers by charging additional levies. But this is not possible, as the process of seeking approval for any extra levy is quite lengthy and cumbersome.

Despite all these challenges, a majority of the teachers interviewed had a favorable opinion of the FPE program in terms of learning when it comes to the impact textbooks. 60% of the teachers said textbooks had a great positive impact on teaching and learning, while 40% said the impact was moderate.

Figure 5.2



Source: Field Data

5.9.2 Physical facilities

The increased enrollment as a result of the FPE program has resulted in the straining of the physical facilities such as classrooms, play grounds and sanitary facilities.

5.9.3 The Role of Parents

Some teachers noted that some parents have neglected their responsibilities in helping enhance the FPE program, as they had left the whole burden to the Government. It seems that the parents have interpreted the FPE as a "thank you note" from the Government for having voted it in, and therefore many parents no longer bother with contributing anything towards their children's in schools, especially in the rural areas. This has tended to sour the relationship between the parents and teachers.

6.0 CONCLUSION

Based on the above findings we can conclude that the implementation of FPE has broadly achieved the objectives and goals of UPE, especially accessibility. However, like similar interventions by previous governments, the implementation has been handled more as a matter of political expediency rather than a well thought out and planned program. The NARC government, like its predecessors, did not carry out a situation analysis prior to the implementation of FPE. The consequences as brought out in this report have been: poor quality of education as a result of overcrowding and understaffing. The administrative challenges at the MOEST, which attempts to deal with problems relating to funding and infrastructure in an ad hoc manner, only serves to complicate the situation.

7.0 RECOMMENDATIONS AND SUGGESTIONS ON THE WAY FORWARD

The following recommendation and suggestions are made as a way forward.

- (a) It is difficult for a teacher who has no training in accounting matters to effectively manage school funds. Therefore, the government should consider employing accounts clerks in schools to manage the FPE funds, as happens in secondary schools.
- (b) A one week seminar on financial management is not enough, and therefore, the government should be organizing more intensive training sessions in financial management for the head teachers, their deputies and the members of the SMCs. This training of the school managers should be regular and continuous. In addition, it would be good for the MOEST to make it compulsory for teachers in training colleges to do courses in financial management. In the long run, this will go along way in reducing financial management problems experienced by majority of the public schools.
- (c) The money (Kshs 1020) given for FPE per pupil per year for teaching and reading materials as well as for other expenses is not enough. It is imperative, therefore, for the government to source for more funds (from both local and external resources) in order to increase the allocation per pupil.
- (d) The ministry auditors and inspectors should be visiting schools more often and should offer guidance to school committees and head teachers on a continuous basis.
- (e) Kenyans seem to know very little about the FPE apart from the fact that education is free. There is, therefore, need for a clear campaign to sensitize the population about the policy and the program, including explaining clearly the roles of the various stakeholders in the implementation of the program.
- (f) The government should address the long-term sustainability of the FPE program, as well as issues of quality assurance and maintenance of standards.
- (g) There is need for the government to differentiate between urban schools and rural schools in the allocation of funds, instead of awarding equal amounts to schools solely on the basis of enrollment.
- (h) Overall, the government should also address the macro socio-economic issues and challenges that affect not only enrollment, but also learning and retention rates. These include poverty, hunger, sanitation, disease, etc.

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