

**EFFECTS OF BURSARY SCHEME IN THE RETENTION AND  
COMPLETION RATES OF PUBLIC SECONDARY SCHOOL  
STUDENTS IN KAMARINY DIVISION IN ELGEYO  
MARAkwET COUNTY, KENYA**

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**A Research Proposal submitted**

**in partial/fulfilment for the degree of Master of Public Policy and  
Administration.**

**Kenyatta University**

**July, 2014**

# DECLARATION

This proposal is my original work and has not been presented  
for a degree in any other university.

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## **ABSTRACT**

The purpose of the study is to establish the effects of the bursary scheme in the retention and completion rates of Public Secondary School students in Kamariny Division, Elgeyo Marakwet County in Kenya. The study aims at establishing the criteria used to award bursaries to needy students and its effects on retention, establish the adequacy of the bursary funds distributed, the timing of the release of funds, its influence on drop-out and ways of strengthening the communication on Secondary Education bursary funds. The research will review related literature on the bursary scheme and will be based on the Human Capital Theory advocated by Schultz (1960). The study will adopt a descriptive survey design and target 19 head teachers, 3129 Public Secondary School students and 15 Constituency Bursary Committee members in Elgeyo Marakwet County. Purposive sampling will be used to get the number of students who had applied for bursary from the 18 Public Secondary Schools and 2 Constituency Bursary Committee Officials. The study will involve administering a set of questionnaires to principals and to students and use an interview schedule for the Constituency Bursary Committee officials. Document analysis will be conducted on records of students who had applied for bursaries and those who benefited for the period 2006-2010. Validity of the instrument will be enhanced through piloting and review by experts while reliability will be ensured using the test re-tests method. The data collected from the field will be coded and entered into computer for analysis using the statistical package for socio-sciences (SPSS). Descriptive statistic analysis will be employed; including frequencies, means and percentages. The results of data analysis will be presented in frequency tables, histograms and pie charts. The study seeks to establish the major factors considered in allocating bursaries and students' source of information about constituency bursary funds. The adequacy and timeliness of the amount of bursary funds awarded to needy students will be evaluated. Constituency Bursary Committee Officials will also provide details on sub-division of the total amount of bursary among the constituencies in the county. Based on the findings, the study will aim at recommending that there should be adequate sensitization on the existence of the bursary funds. Fairness and timely allocation of funds to genuinely needy students and all bursaries available to Secondary Schools should be harmonized to avoid duplication of resources and the bursary scheme to meet its objectives.

## **Abbreviations and Acronyms**

BOG Board of Governors

CBC Constituency Bursary Committee

CDF Constituency Development Fund

DEO District Education Officer

GER Gross Enrollment Rate

IPAR Institute of Policy Analysis and Research

KCSE Kenya Certificate of Secondary Education

MoE Ministry of Education

MP Member of Parliament

SEBF Secondary Education Bursary Fund

SPSS Statistical Package for Social Sciences

## **Operational Terms**

**Access:** Refers to gaining admission into a secondary school of a cohort of qualified students with varied regional, ethnic, gender and economic background.

**Bursary:** A bursary is a sum of money which is given to someone to allow them study in a school, college or university.

**Bursary Scheme:** The system of awarding students grants to enable them pay for their school fees.

**Completion Rate:** Refers to the proportion of students who complete the last grade of a school cycle divided by the number of students who enrol the grade at the beginning of the cycle.

**Constituency:** Refers to political boundary that constitute wards and/or municipalities represented by one member of parliamentary jurisdiction of the constituencies.

**Constituency Development Fund:** It is a government fund which comprises of 2.5% of the government annual revenue given directly to a constituency through the area member of parliament for development projects.

**Drop-out rates:** The percentage of pupils withdrawing from school before completing the terminal stage of education.

**Needy student:** Refers to a boy or girl enrolled in a public secondary school and is willing to learn but is financially poor.

**Participation Rate:** An education index indicating the percentage of students who originally enrolled, remain in the system and ultimately graduate.

**Poor Student:** Any student whose parents or guardians are unable to pay for their education due to their socio-economic status which is determined by such factors as the level of education occupation and income.

**Public Sec School:** Those secondary schools that are maintained or assisted out of public funds according to CAP 211 and CAP 212 of the laws of Kenya.

**Repetition:** Cases where a student spends more than one academic year in one class. It reduces intake capacity of the grade or causes overcrowding in the classrooms thus increasing cost.

**Retention Rate:** Refers to grade to grade promotion of students until completion.

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## **CHAPTER ONE: INTRODUCTION**

### **1.1 Background to the study**

Access to and retention in secondary schools in Kenya is still low with a transition rate from primary to secondary school being 50% (Mwaluko, 2007). Secondary schools education also suffers drop-out rates ranging from 10% to 50%. Completion rates have also been impacted negatively. According to Action Aid Kenya (2007) completion rates at secondary levels was 87.5% in 2006, the GER was 36.8% and up to 2.8 million children aged between 14 and 17 years who should be in Secondary schools were not enrolled in 2006.

Education is universally recognized as a form of investment in human capital that yields economic benefits and contributes to a country's future wealth by increasing the productive capacity of its people (Woodhall, 2004). United Nations Educational, Scientific and Cultural Organization [UNESCO] (1960) declared access to Education as a human right and recognizes possession of basic education to all citizens of a country as a human right. UNESCO (2007) further adds that education is a key development issue that is indispensable for human capacity development and poverty eradication.

In 1990 at the World Conference on Education for All in Jomtien, Thailand and again in April 2000 in Dakar, Senegal, most developing countries re-affirmed their commitment in providing their school age children with universal access to first cycle of education (Lewin&Calloids, 2001). Lewin&Calloids (2001) further adds that enrolment in primary schools has increased for many of these countries while secondary education has been quietly neglected. However studies by World Bank (2002) indicate that many World Bank client countries in Latin America and East Asia have shown an increasing interest in expanding and strengthening their secondary education systems though many challenges remain. These include lower completion rates for young people from lower income levels. Lack of private resources is a key determinant of access to and completion of secondary education. Direct costs of education represent 22% of per capita household income in Bolivia

According to Lewin (2008), of the World's 6 billion people, 2.8 billion (almost half) live on less than two dollars a day and 1.2 billion (a fifth), live in less than a dollar a day with 93% living in South Asia, East and Sub-Saharan Africa. Improved access to education can reduce income inequality and eradicate poverty (Todaro, 2003)

The secondary Education in Africa (SEIA) initiative has conducted a participatory process of analysis, dialogue and reflection in Sub-Sahara Africa with a conclusion that countries need to address the triple challenge of expanding access, improving quality and ensuring equity in education (Veerspoor, 2007). SEIA also argues that governments in this region need to allocate on average nearly 6% of Gross National Products (GNP) to secondary schools to achieve Gross Enrolment Rate (GER) of 85%.

Education is a profitable private investment yet many students cannot afford to finance it out of their own family resources (Psacharopolous&Woodhall, 1985). Governments therefore need to provide funds to support a broad base equitable expansion of secondary education with incentives for private provision and subsidies to disadvantaged students to ensure equity of opportunity and eventually eradicate poverty (Veerspoor, 2007; Psacharopolous&Woodhall, 1985) Ayot& Briggs (1992) identified various student aid policies. These include tuition-free schooling, scholarships and bursaries to needy students, student's loans and vouchers specifically for education. However, studies on effects of subsidies in Colombia, Malaysia, Kenya and Indonesia all suggest that the methods need to be re-appraised since they do not achieve both efficiency and equity objectives (Psacharopolous&Woodhall, 1985).

In U.K, Smith (2006, as cited by Opon, 2007) argued that the complicated systems of bursaries, grants and fees is no doubt confusing many students and their parents and is clearly not working. Hackett (2008) further adds that some €12 million in bursaries that should have gone to students from disadvantaged groups was left unclaimed since students were simply not aware of what was available. In Malawi, the government bursary scheme does not sufficiently address students' needs at the secondary school levels as few Malawians and district level employees are aware of the program and the requirements of the bursary process. Bursary funding is extremely limited and varies by district (World Bank, 2002).

Policy initiatives in Kenya have focussed on the attainment of Education for All (EFA) and in particular, Universal Primary Education (UPE) and Millennium Development Goals (MDGs) (GOK, 2005). The key concerns are access, retention, equity, equality and relevance and internal and external efficiencies within education system. The Secondary Education Strategy (GOK, 2007), identifies the implementation of Free Primary Education (FPE), Free Day Secondary School Education (FDSE) and the secondary schools bursary scheme as critical to the realization of the EFA goals. Other measures that the Government is taking to strengthen secondary education include rationalizing and revising the curriculum to reduce the load on

students and teachers and the consequent cost burden on the Government and parents, provision of infrastructure, improvement grants and laboratory materials and equipment (GOK, 2007).

According to Republic of Kenya (2009), the number of public secondary schools rose from 3583 in 2003 to 3612 in 2007, while the government recurrent expenditure allocation to education rose from Kes. 68.2 billion in 2003/04 financial year to Kes. 95.8 billion in 2007/2008 financial year. These figures show that the government has continued to invest massively in secondary education and the impact is shown in the steady increase in enrolment.

Republic of Kenya (1988) recommended the introduction of cost sharing in education. The government effected this policy through Sessional Paper No. 6 of 1988 (GOK, 1988). While previously the government met most of the costs of secondary education, the cost of sharing policy resulted in most of the burden of financing secondary education being shifted to parents and local communities. According to Oyugi, Riechi and Anupi (2008), this made the cost of secondary education to rise substantially, resulting in low participation of poor households in secondary education. Apart from reducing access to secondary education by students from poor and vulnerable families, the policy of cost sharing led to reduced retention and completion rates. It also led to regional disparities and inequalities in the provision of secondary school education. Apart from increased poverty, the burden of financing secondary education on the poor and vulnerable families was made worse by high inflation rates and the effects of HIV/AIDS scourge.

According to the Ministry of Education circular Ref. No. G9/11/VIII/101 dated 22/9/2003, the Secondary School Bursary Scheme was formalized to meet clear objectives including enhancing equity by allocating funds on the basis of poverty index and enrolment; increasing access to secondary education from children from poor and vulnerable households; ensuring retention of the poor who enter secondary schools; enhancing completion by those who enter secondary schools; reducing regional disparities and inequalities in access and provision of secondary school education; contributing to increase in transition rate from primary to secondary.

Nevertheless, the Kenya Government has over the years instituted a number of measures to promote access to and completion of secondary education. One such measure was the issuance of fees guidelines for public secondary schools (MOE, 2002). According to these guidelines, national schools were to charge Kshs. 28,900. Other schools Kshs.22, 900 and day schools

Kshs. 10,500. However, this had been flouted in many schools with some schools charging between Kshs. 35,000 and Kshs.50, 000 (UNESCO, 2008).

The provision of government bursary scheme for poor students is another measure that has been taken to enhance participation of the poor in secondary education (Republic of Kenya, 2005). The secondary Education Bursary Fund (SEBF) was introduced in 1993/1994 financial year as a safety net to cushion the poor and vulnerable groups against the adverse effects of cost sharing in education (Njeru and Orodho, 2003). From its inception up to 2003 the SEBF was disbursed directly to all public secondary schools in the country taking into consideration the school population. Head teachers and Board of Governors were charged with the responsibility of identifying the needy students and allocating them money. This however changed in 2003/2004 financial year when the management of the bursary funds was transferred from the schools to the Constituency Bursary Committee (CBC) in line with the government's policy on decentralization and Constituency Development Fund (C.D.F) Act (GOK, 2003; GOK, 2005). There were also concerns that the school authorities were not the best placed to identify needy students and there was lack of transparency and accountability at the school levels with regard to administration of the bursary (Njeru and Orodho, 2003).

Republic of Kenya (2005) gave the Revised Guidelines for Disbursement of secondary school bursary through the constituencies. However, recent studies by Institute of Policy Analysis and Research (IPAR 2008) indicate that only 42% of applicants for SEBF get the minimum Ksh.5, 000. The M.Ps' controls the bursary money alongside CDF making it open to political manipulation (Otieno 2009). The objective of the bursary scheme includes increasing access to secondary schools; ensuring retention in secondary schools; promoting transition and completion rates; reduce disparities and inequalities in provision of secondary education (MoE 2005).The guidelines indicate that the target groups are orphans; children from poor households; children from semi-arid areas and the girl child.

To this end the pertinent question is whether the Government of Kenya can satisfy the ever increasing population with the limited number of secondary school places in order to enhance access to and retention in secondary school education. It is against this background that the researcher decided to carry out a study to investigate the effects of bursary scheme in retention and completion rates of public school students in Kamariny Division, Elgeyo Marakwet Kenya.

The bursary budgetary allocation from 2005/2006 to 2009/2010 is as shown in table 1.1

Table 1.1; MOE bursary allocations 2005/06 – 2009/10

Year	2005/06	2006/07	2007/08	2008/09	2009/10
Allocation (Kes) Millions	800	800	600	500	500

Source: MOE Bursary Section Data, 2010

The table shows a reduction in allocation of bursary from Kes. 800m in 2006/07 to Kes.500m in 2009/10. According MOE Circular Ref. No. S19/17/155 dated 24/1/2008, this is due to the introduction of Free Day Secondary School Education (FDSE), which was introduced in January 2008 as another mode for financing secondary education.

## 1.2 Statement of the Problem

In 2003, the Government started allocating Secondary School Bursary Funds to constituencies. The major objective of the scheme was to enhance access to and ensure high retention of students in secondary education level for all Kenyans particularly the poor and the vulnerable group. Administrative systems of the Constituency Development Fund are riddled with inefficiency and irregularities such as delays in disbursement of funds to beneficiaries, corruption, political patronage and nepotism, (2009, November 4). *The Standard Newspaper*, p.6. Worse still, is the lack of defined eligibility criteria, inadequate awareness of funds existence and poor co-ordination which inhibit regular school attendance for the beneficiaries. Furthermore, the 2009 Population and Housing Census Report, shows that Kamariny Division registered the lowest enrolment of secondary school of 1,703 compared to her neighbouring Bukar Division with 2,446 and Tambach Division with 2,506. These disparities exist yet the stated divisions are in the same economic area and are allocated the bursary funds as per the poverty index (Republic of Kenya 2010).

## 1.3 Research Questions

The study will seek to answer the following questions:

- i. What criteria is used to identify needy students in secondary schools?
- ii. To what extent does the total amount of bursary fund awarded enhance retention in public secondary schools?
- iii. To what extent does the timing of the release of the bursary funds influence enrolment and retention in public secondary schools?

- iv. What constraints derail effectiveness of the disbursement procedure for bursary funds?
- v. What extent does the communication on bursary funds to the community enhance retention of needy students in public secondary schools?

#### **1.4 Objectives of the Study**

- i. Determine the criteria used to identify needy students in secondary schools.
- ii. Establish the extent to which the total amount of bursary fund awarded enhances retention in Public Secondary Schools.
- iii. Establish the extent to which the timing of the release of the bursary fund influences enrolment and retention in Public Secondary Schools.
- iv. Establish the major constraints in the disbursement procedure of bursary funds.
- v. Determine the extent to which communication on bursary funds to the community enhances retention in Public Secondary Schools.

#### **1.5 Assumptions of the Study**

The study will be based on the on the following assumptions:

- i. The researcher will assume that the bursary scheme will enable the poor students to access and participate in secondary education.
- ii. It is also assumed that the respondents are able to provide reliable information.
- iii. The other assumption is that a student's retention in school is highly dependent on his or her ability to meet the school fees needs in any given year.
- iv. The government will continue allocating funds for the secondary school bursaries through Constituency Bursary Committee.
- v. Constituency Bursary Committee is consistent in applying the guidelines for disbursement of bursaries to needy students in every public secondary school.

#### **1.6 Significance of the Study**

The study will generate information that may be useful to the Ministry of Education, Science and Technology and The National Treasury to reassess the level of effectiveness and efficiency in the operation of the bursary scheme based on whether it mitigates against realizing increased students enrolment and retention at the secondary school level.

The findings of this study will also contribute to a pool of knowledge of those studying education management planning and especially those specializing in economies of education in Kenya and elsewhere in the world. The study may also contribute to expanding the existing literature on the bursary scheme in particular and financing of education in general. At the same time, implementation of the recommendations of the study might result in greater access to secondary education for children from poor and vulnerable households, as its recommendations might result in better targeting of needy students by ensuring that only the most needy and those who qualify are allocated bursaries on a sustainable basis.

School administration, parents and political leaders and Constituency Bursary Committee members may also gain data to help them understand the challenges faced in management of bursary funds and may help them come up with solutions to the problems found.

The information may result in action to make the management of the bursary scheme to be more effective and efficient. The study might trigger further examination to other government devolved funds such as Roads Fund, CDF and LAFT, as some of the challenges facing Secondary Education Bursary Scheme may also be facing other devolved funds.

Finally, the countries that are likely to introduce bursary schemes at their secondary school level may, through this study, gain some insight into some likely outcome of such schemes.

### **1.7 Limitations of the Study**

The researcher will not be able to influence the attitude of the respondents who take sides due to the publicity that the bursary scheme has received in recent times. It should also be noted that the bursary funds are disbursed through the constituencies hence respondents might be politically biased out of fear of political victimization. The research will also get limited literature on the constituency bursary scheme due to limited studies. This is mainly due to the fact that such a novel scheme for disbursing bursary funds through devolved structures is a recent practice in Kenya and has not been practised in many countries.

### **1.8 Delimitations of the Study.**

This study will be conducted in Kamariny Division, Elgeyo Marakwet County, Kenya. The study will confine to head teachers of public Secondary Schools being the government senior agents at the school level. Although Secondary education is a product of concerted effort of

both the government, parents, NGOs and the community and operates hand-in-hand with private sector involvement, the study will be carried out only in all the sampled State Sponsored Secondary Schools. The head teachers from private Secondary Schools will be excluded as their schools do not enjoy direct government support in the provision of education.

## **CHAPTER TWO: LITERATURE REVIEW**

### **2.1 Introduction**

The related literature will be reviewed focusing on financing of secondary education in other countries, the history of bursaries as a means of financing education in Kenya, the constituency bursary fund in Kenya, bursary studies, theoretical framework and conceptual framework.

### **2.2 Financing of Secondary Education in Other Countries**

In developed countries, education beyond the compulsory level is usually financed in part and sometimes wholly by the state. In Britain, up to secondary school level is fully financed by the Government (Moon & Mayes, 1994). Parents are only required to ensure that children attend school. Parents are seen as the school's prime legal clients until the child is 16 years of age. In Japan, the government fiscal policies provide for full government funding to facilitate free education up to Secondary school level. Education is compulsory for children of school going age (Nyaga, 2005). In the United States of America (USA), the Federal government supports public education (Roe, Edgar & Merphet, 1969). The government is empowered by the Constitution welfare Clause, article 1 Section 8, to levy taxes and collect revenues for the support of education, whose extent is decided by Congress. About 40% of the funds for schools are furnished by the individual States. In Canada, school fees are an integral part of the education system. Parents are asked to contribute to the children's education through payment of fees (Nyaga, 2005).

In Namibia, a number of development initiatives have been taken. Republic of Namibia (1997, as cited in World Bank, 2007) indicates that the initiatives led to development of a Government white paper on higher education. This paper proposed the changing of the public service bursar scheme to a Namibia Students Financial Assistance Fund (NSFAF). The rationale for this was that the previous bursary scheme of the government had passed to be inadequate and out-dated since it specifically targeted future civil servants. The new scheme is based on three different components: – Bursary Award (grant scheme), Loan scheme and Partial loan. A full bursary award is to be granted only in exceptional case. The parameters for awarding financial support to students are allocation according to regional quota and priority fields of study.

### **2.3 Historical Background to Bursaries as a Means of Financing Secondary Education in Kenya.**

According to the Kenya Education Commission (Ominde) Report (GOK, 1994), at the time of Kenya's independence in 1963, Education provision was the preserve of the ministry of Education, churches and independent schools. It was therefore up to the Ministry of Education to see to it that Education was provided to all those who needed it in the society. All students who were able to pay fees for Secondary education were able to access it and those who were unable were able to access Secondary education through bursary funds and other funding from Non-governmental organization (NGO's), rich Kenyans willing to help the needy, church organizations, Jomo Kenyatta Foundation, private organizations and private donors.

### **2.4 Rationale Behind the Establishment of Bursary Schemes in Kenya.**

Various studies have been undertaken to establish the impact of cost sharing on education at all levels of education. The findings show that cost sharing impacts negatively on retention and completion rates in education and recommendations include establish of bursary schemes. Most secondary schools remain fee paying and the poorest households continue to be excluded by the direct cost of attendance. Reforms are needed to reduce public costs per student; transfer costs to those who can afford to pay and subsidize those from poorer households (Lewis, 2008).

Abagi and Odipo (1997) found that increased cost of education led to decline in enrolment and rise in dropouts. Misheck (2005) on a study of factors affecting students' access and participation in secondary school found that the high cost of schooling was the major factor contributing to poor access and participation in secondary education in Meru Central District. Tan and Mingat (1992) says that equity measures in this case should include a limited number of scholarships awarded based on income and academic performance. This means that in low income families more education for an eligible child often means less or no education for another.

A study by Gachugi (2005) on factors influencing student wastage in secondary schools indicate that retention of those who are already enrolled in schools for a defined cycle is hindered by poverty which lead to inability of the parents to meet the costs of education. Gachugi argued that retention of those already enrolled in school is a crucial issue in the Kenyan education system and hence recommended an increase in bursary allocation.

## **2.5 The Constituency Bursary Fund for Financing Secondary Education.**

Prior to 2003, disbursement of bursaries to schools was centralized at the Ministry of Education (MOE) Headquarters at Jogoo House. During this period, head teachers and school managers disbursed the funds to needy students. However, a number of complaints arose as follows: Firstly, it was noted that undeserving students benefiting from the bursary fund. The managers and the head teachers allocated bursary funds to those students from rich families and hence denying the funds to the deserving students.

Secondly, as a result of proper communication to parents or guardians and the beneficiaries, very few beneficiaries are reached. Thirdly, due to the rampant corruption in the management of bursary funds, ghost students and children of well-connected individuals being allocated bursaries. Fourthly, it was also observed that too small amounts were being allocated. As a result, the bursary fund does not adequately assist needy student because it is quite insufficient. Fifthly, it was observed that there is lack of clear criteria for bursary allocation. As a result of the absence of well-defined criteria, there was no transparency and accountability by MOE and schools (MOE bursary section data, 2003).

Finally, it was observed that the bursary funds were not disbursed in a timely manner and as a result, the funds it affected the school operations leading to needy students being sent away from school. It was in response to these challenges and other challenges that MOE devolved these to the constituencies in 2003. The rationale for this devolvement was to improve education service delivery and accountability as well as expanding the number of beneficiaries. The new approach facilitates participation of the relevant stakeholders at the grassroots, thus improving governance and accountability. This is also in line with the Poverty Reduction Strategy Paper (PRSP) of 2002, which stresses that programmes and projects should support national development and reduces poverty.

The Ministry of Education circular of 22<sup>nd</sup> April 2005 addressed to all District Education Officer, REF.NO.G9/1/V11/101, set in motion revised guidelines for the disbursements of Secondary School bursaries through constituencies. This policy was implemented from 2003/2004 financial year and was communicated to stakeholders vide circular Ref.No.G9/1/(61) dated 22/9/2003 through all District Education Officers. In 2003, the Government of Kenya decided that, in line with the government policy on decentralization and empowerment of communities, from the 2003/2004 financial year, the Secondary Schools bursary funds would be administered at the constituency and district levels. Since then, all

Secondary education bursary funds have been sent to the constituencies where it is disbursed through the constituency bursary committee in the understanding that communities are better placed to identify the poor among them.

The objectives of the bursary schemes include increasing access to Secondary Schools, enhancing transition and completion rates in Secondary Schools, and reducing disparities and inequalities in the provision of Secondary School education (GOK, 1995). The bursary programme is intended to assist the following group of students: orphans, children from poor households (especially those with no incomes), children from ASAL areas and urban slums, the girl child and children in difficult circumstances, those with special needs and girls rescued from difficult circumstances including early marriages and pregnancies (MOE Circular Ref.No.G9/1/V11/101 dated 22<sup>nd</sup> April 2005). The bursary allocation to each constituency is calculated based on the number of students from the constituency enrolled in Secondary Schools in Kenya, the national Secondary School enrolment, the district poverty index and the national poverty index.

The formula used to allocate bursaries to the constituencies is:-

$$\text{Constituency bursary} = \frac{\text{Amount allocated} * \text{constituency enrolment} * \text{district poverty index}}{\text{National enrolment} * \text{national poverty index}}$$

This formula promotes equity by allocating more funds to constituencies with higher poverty level, hence aims at facilitating access and retention of children from marginalized areas including ASAL and urban slums.

## **2.6 Guidelines for Constituency Bursary Committee (CBC)**

The Committee shall have maximum of sixteen members, at least a third of whom must be women. The Committee comprises the area of Member of Parliament (Patron), the area Education Officer (Secretary), three representatives of religions organizations, two Chair persons of Parents Teachers Association (PTA's) of two Secondary Schools, one Chairperson of board of governors, one Councillor, one district officer, one representative of an educational base Non-Government organization (NGO) or Community based organization (CBO), one local KNUT representative, three co-opted members to include two head teachers, one whom must be from a girl's Secondary School.

The Government through the Ministry of Education has given strict instructions to be followed by DEO's on the management of government bursaries through MOE circular Ref.No.G9/1 (61) dated 22/9/2003. Girls are to benefit by getting a special reservation of 5 percent of the bursary allocated to the CBC. This is for the purpose of sustaining more girls in schools to help bridge education gender disparities. The functions of the Constituency bursary Committee are to issue and receive bursary applications using the established criteria; to verify and ensure all bursary cheques and dispatched to the schools in a timely manner, to prepare and submit reports on the constituency bursary scheme to the Permanent Secretary, Ministry of Education. The minimum amounts recommended for applicants various categories of Secondary Schools should be reasonable to increase access completion and retention as follows: - Day Secondary Schools – Kes.5, 000, Boarding Secondary Schools – Kes.10, 000, National Schools – kes.15, 000. Bursary Committees post cheque directly to the respective Secondary Schools. Beneficiary (Parents and guardians) should not handle the cheques. The committees are authorized to utilize up to Kes.25, 000 in each tranche for administrative postage, travelling expense but not for sitting allowance.

## **2.7 Studies on Bursary Schemes.**

Oyugi, Riechi and Anupi (2008) carried out a survey on Public Expenditure Tracking of Secondary Education Bursary Fund in Nairobi Province. The objectives of the survey were:- assess the level of demand and efficiency for the Secondary Education bursary fund in Nairobi Province; find out if there were leakages in Secondary education bursary fund in Nairobi Province; and make appropriate recommendations so as to strengthen the bursary fund. The survey revealed that the bursary scheme was experiencing a number of challenges, notably: inadequate funds disbursed from the Ministry of Education; poor use of allocation guidelines and inconsistent support to needy students. Further, the findings indicate that there was poor keeping on records resulting in huge variations between funds allocated to constituencies and those disbursed to beneficiaries. The survey recommended the allocation of more funds to constituencies and financing of a few beneficiaries adequately to completion; disbursement of funds to constituencies in only one phase; revision of the guidelines to address the application procedures; and submission of comprehensive reports.

Another study on Secondary School bursary was done was Price Waterhouse Coopers in 2008. The study was carried throughout the country. Its objectives were to appraise the Secondary School bursary Scheme with a view to developing recommendations on how it could be

improved. The study found that due to poor targeting, monitoring and accountability, it was difficult to ensure that only students who were genuinely needy benefitted from the bursary scheme. It also found that many stakeholders had negative perceptions about the operations of the scheme. This study is meant to establish if the findings of studies of Secondary School bursary by Oyugi et al (2008), PricewaterhouseCoopers (2008), Muthoni (2007) and Njeru (2008) apply to Kamariny Division.

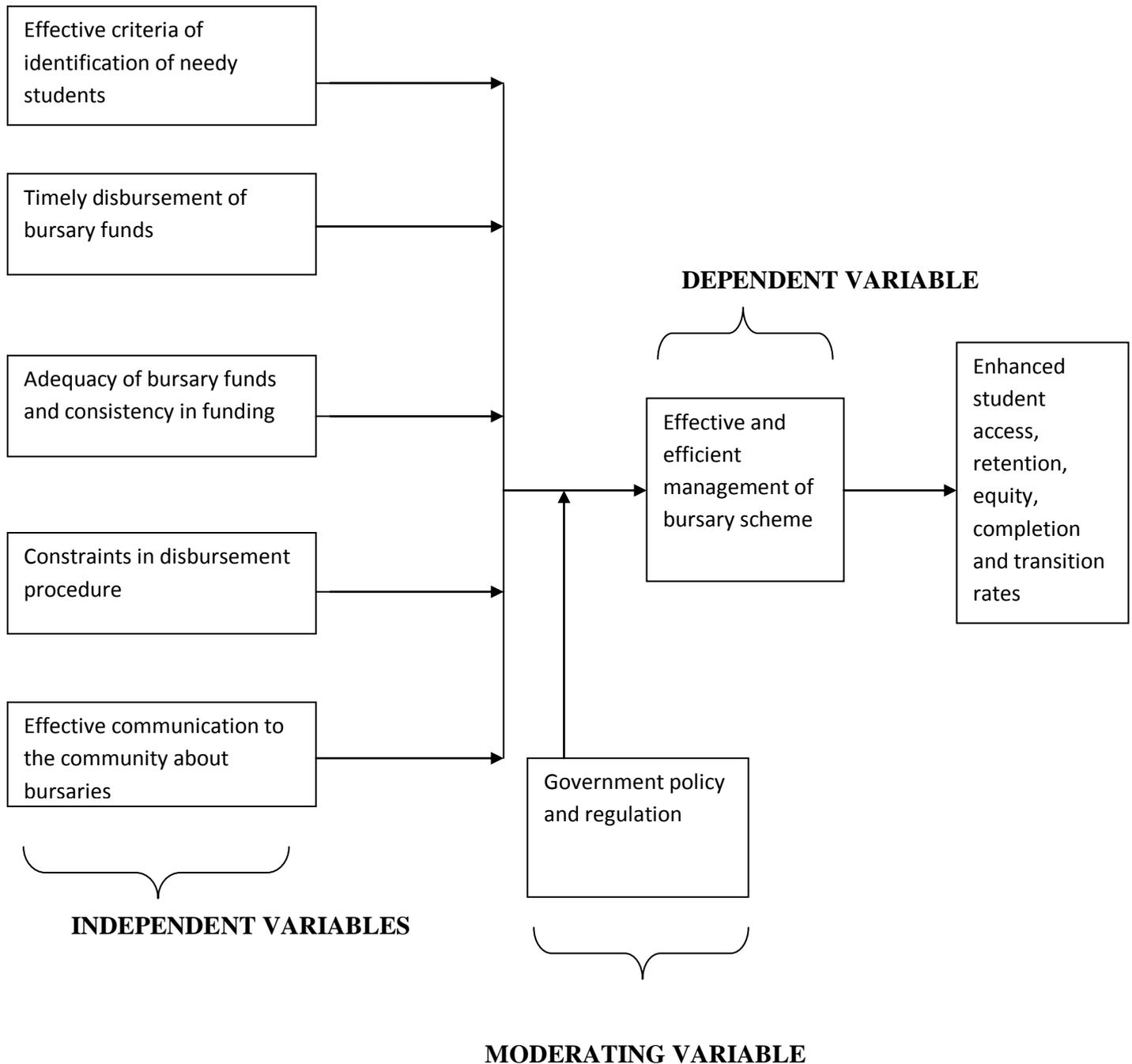
## **2.8 Theoretical Framework**

Theoretical framework in this study will be derived from The Human Capital Theory developed by Schultz in 1971. Traditionally, economic growth was mainly attributed to three factors of production namely: land, labour and capital (money and machines). Schultz in 1971 after extensive study of economic growth in the USA came up with the theory of Human capital investments. He argued that the growth in output could only be adequately explained by the investment in human capital that had taken place in form of formal education, on-the-job training, and improved health adult education and the mobility and migration of workers so that they are able to respond to changing job opportunities (Schultz 1971). According to this theory, people should invest in education for future gain in form of economic development. Investment in education is done by the individual and by the society/government for future expected benefits.

This theory forms an important theoretical base of this study because it explains the high government investment in education in form of bursaries and the communities contribute by foregoing other projects to promote education in Kenya. Investment in education will be realized through high enrolments, high transition rates from primary to secondary school, and provision of facilities and resources of secondary schools. Since bursaries are an investment, this study will analyse the extent to which this investment is realized. It will find out how much of the bursaries have been invested in human capital by funding secondary and education and impact it has had on accessibility to secondary education.

## 2.9 Conceptual Framework

**Figure1.** Conceptual Framework of the effects of bursary scheme in the retention and completion rates at the public secondary school level.



Source: Researcher (2014)

The conceptual framework above shows that the effective and efficient management of bursary scheme will lead to enhanced student retention and completion rates in secondary school education. This is dependent on a bursary scheme where all needy students are properly identified; timely disbursement of the funds is made in line with the school programme; bursary funds are adequate and consistently provided to beneficiaries; mitigation of constraints relating to the disbursement procedure; and information about bursaries is effectively communicated to the community.

The Constituency Bursary Committee must develop fair and transparent criteria in allocating bursaries for secondary school students by ensuring it follows the guidelines provided by Ministry of Education. This would ensure the neediest students benefits from the bursary scheme. Secondly, the Ministry of Education should liaise with The National Treasury to ensure timely disbursement of bursary funds in line with the school programme to ensure high retention and completion rates in public secondary schools. Futhermore, the funds disbursed should be adequate to ensure retention of beneficiaries in school to completion. In addition, The Constituency Bursary Committee must formulate policies to mitigate constraints in disbarments procedures of bursary funds. Finally, effective communication to stakeholders on the bursary scheme enhances would enhance participation hence leading to improved retention and completion rates in public secondary schools.

An important moderating variable is government policy and regulation. Proper policy framework will ensure effective and efficient management of bursary scheme. Implementation of the above moderating and independent variables would enhance effective and efficient management of bursary schemes which can be demonstrated by enhanced access, retention, equity, completion and transition rates.

## **2.10 Summary and Gaps to be Filled by The Study**

The literature review highlighted the need for human capital investment hence justifying the reason why the government spends vast resources in the education sector. Bursaries in other countries were also reviewed for the purpose of making a comparison and establish the criteria used in these other countries.

Various studies have been carried out on secondary school bursaries for example Pricewaterhouse Coopers (PWC) carried out a study in 2008 to appraise the Secondary School

Bursary Scheme in order to develop recommendations for its improvement while Oyugi, Riechi and Anup (2005) carried out a study on public expenditure tracking of the bursary fund in Nairobi Province. However, there are no studies that have been documented on the actual status of bursary funds in Kamariny Division, Elgeyo Marakwet County hence this study seeks to establish the extent to which the fund enhances retention and completion rates in Public Secondary Schools.

The literature showed that despite the effort made by the government, parents, donors, local communities to finance education, secondary education still remains inaccessible to most students. This meant that there was need to look into the amount allocated, time period when funds are made available along with challenges resulting due to decentralization of the funds to the constituencies, particularly in Kamariny Division, Elgeyo Marakwet County, Kenya.

## **CHAPTER THREE: RESEARCH METHODOLOGY**

### **3.0 Introduction**

This section will deal with; the research design, the target population, sample size and sampling procedure, research instruments, data collection procedure and methods of data collection.

### **3.2 Research Design**

The study will employ descriptive survey research design. The research design is considered appropriate for the study because according to Kothari (2010), survey is concerned with describing, recording, analyzing and reporting conditions that exist or existed. Kerlinger (1973) argues that survey method is widely used to obtain data useful in evaluating present practices, and in providing basis for decisions.

According to Orodho (2003), descriptive survey is a method of collecting information by interviewing or administering a questionnaire to a sample of individuals. The research design will therefore enable the researcher to collect data from individuals on the effects of bursary scheme in the retention and completion rates of public secondary school students in Kamariny Division, in Elgeyo Marakwet County, Kenya.

### **3.3 Location of the Study**

This study will be conducted in Kamariny Division in Elgeyo Marakwet County, Kenya. The researcher will target all public secondary schools in Kamariny Division in Elgeyo Marakwet County in Kenya since Kamariny Division is the area most affected by drop-out cases. There are many factors that may affect retention and completion rates at the secondary school level in Kamariny Division. However, this study will only focus on the bursary funds and its effect on enhancing retention and completion rates. There are bursary schemes at other levels of education but in this study, the researcher is interested in the secondary school level only

### **3.4 Target Population**

Luck and Ruben (1992) define target population as all the members of a real hypothetical set of people, events or objects to which we wish to generalize the results of our research. In this case, two categories of respondents are crucial, namely; informed specialists and consumers or users.

The study will target the following categories of participants who will provide specific kinds of information for the study.

*Table 1.2; Target Population*

<b>Category</b>	<b>Target Population</b>	<b>Percentage(%)</b>
Students	3630	99.561
Head teachers	11	0.114%
Opinion Leaders	2	0.055%
Education Officers	1	0.02743%
Bursary Committee Members	2	0.055%
<b>TOTAL</b>	<b>3646</b>	<b>100%</b>

*Source: Researcher (2014)*

### **3.5 Sample Size**

The sample size breakdown will be as follows:

*Table 1.4; Sample size*

<b>Category</b>	<b>Population size</b>	<b>Percentage applied(%)</b>	<b>Sample size</b>
Students	3630	5.45%	198
Headteachers	11	60%	6
Opinion Leaders	2	100%	2
Education Officers	1	100%	1
Bursary Committee Members	4	100%	4
<b>TOTAL</b>	<b>3646</b>		<b>211</b>

*Source: Researcher (2014)*

### **3.6 Sampling procedure**

Stratified random sampling will be used to select 6 secondary school principals from a total of 11. The six schools selected will be considered as good performing schools in the division to eliminate the many other factors that may have affected participation rates at the secondary school level in Kamariny Division, Elgeyo Marakwet County. From each of the 6 secondary

schools, 33 needy students which represent 10% of the school student population will be selected using random sampling.

Purposive sampling will be used to select the education officers and since the research will be conducted in Kamariny Division in Elgeyo Marakwet County, there is only one District Education Officer (DEO).

Two opinion leaders will be selected from the two constituencies in Elgeyo Marakwet County i.e. Bukar and Sergoit constituency. The two members of parliament are selected because they are in-charge of the Constituency Bursary Committee.

In addition, purposive sampling will also be applied to obtain two Constituency Bursary Committee members namely secretary and treasurer, to provide information regarding the number of bursary applicants, timeliness of the bursary, how needy students shall be identified and the adequacy of financial resources available to the bursary committee

### **3.7 Research Instruments**

The research instruments that will be used in this study includes questionnaires, personal interview and documents analysis. According to Mulusa (1998) questionnaires are cheap to administer to respondents scattered over a large area and respondents feel free to give frank answers to sensitive questions. The questionnaire will used to capture demographic data, respondents' characteristics, access and participation

The personal interview will be scheduled to obtain in-depth information from the head teachers regarding student enrolment, retention, participation and effectiveness of the bursary funds in enhancing participation rates in secondary school education for the poor and the vulnerable groups.

### **3.8 Data Collection Procedure**

The researcher will obtain an introduction letter from Kenyatta University and a research permit from the National Council of Science and Technology. The researcher will then book an appointment with the sample schools through the head teachers to visit and administer the questionnaires and conduct interviews. The researcher then shall visit each of the schools and collect the data.

The respondents will be given clear instructions and assured of confidentiality after which they will be given enough time to fill in the questioners. The researcher then will collect the filled in

questionnaires for analysis and interpretation. The researcher will then book appointments with the head teachers and constituency bursary committee members on dates when interviews shall be held. Various documents available in schools and constituency bursary funds office will also be analyzed.

### **3.9 Data Analysis**

Data collected from the field will be coded and entered into the computer for analysis using the Statistical Package for Social Science (SPSS). This research will yield data that requires both qualitative and quantitative analysis. Quantitative analysis entails analysing numbers about a situation by choosing specific aspects of that situation. Descriptive statistics will be used to analyze the quantitative data obtained. The statistics used will include frequency counts, means and percentages. The qualitative data obtained in this study will be analyzed by organizing it into similar themes and tallying the numbers of similar responses and then reporting the data thematically in line with the research questions. The results of data analysis will be presented in frequency tables, bars, graphs and pie charts.

### **3.10 Ethical Consideration**

In the data analysis, the researcher will maintain integrity in the application of statistical skills to problems where private interests may inappropriately affect the development or application of statistical knowledge. Confidentiality and objectivity would also be maintained during the collection of data and further application.

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## **APPENDICES**

### **APPENDIX I: Letter to the Head Teachers**

**EZEKIEL K. TANUI,  
KENYATTA UNIVERSITY,  
P. O. BOX 43844 - 00200,  
NAIROBI.  
0722 735095**

#### **THE HEAD TEACHER**

Dear Sir/Madam,

**RE: PERMISSION TO CONDUCT A RESEARCH IN YOUR SCHOOL**

I am a post graduate student at the Kenyatta University currently carrying out a research study on the effects of bursary scheme in the retention and completion rates of public secondary schools in Kamariny Division in Elgeyo Marakwet County, Kenya.

Your school has been selected to take part in the study. I kindly request your authority to gather the required information from a few of your students through questionnaire and conduct an interview with you regarding bursary disbursement in your school.

The questionnaires are specifically meant for this study and the responses will be treated with strict confidentiality; therefore, no name of respondent or that of your school will be required.

Your assistance and support on this matter will be highly appreciated.

Yours faithfully,

Ezekiel K. Tanui.

## **APPENDIX II: Letter to the Respondents**

**EZEKIEL K. TANUI,  
KENYATTA UNIVERSITY,  
P. O. BOX 43844 - 00200,  
NAIROBI.  
0722 735095**

Dear respondent,

**RE: THE EFFECTS OF BURSARY SCHEME IN THE RETENTION AND COMPLETION RATES OF PUBLIC SECONDARY SCHOOL STUDENTS**

I am a post graduate student at the Kenyatta University currently carrying out a research study in the above stated subject in Kamariny Division in Elgeyo Marakwet County, Kenya.

I kindly request you to respond to all the items in the questionnaire as honestly and correctly as possibly.

In case you will be interested; you are welcome to share the findings of the study.

Thank you for your co-operation.

Yours faithfully,

Ezekiel K. Tanui

## APPENDIX III: Students' Questionnaire

### PART A

#### RESPONDENT CHARACTERISTICS

- 1) Indicate your gender  
Male  Female
  
- 2) Indicate your form  
Form 1  Form 2  Form 3  Form 4
  
- 3) What is the category of your school?  
Boarding  Day  Day and boarding
  
- 4) What is the type of your school?  
Boys  Girls  Mixed
  
- 5) How many marks did you obtain at K.C.P.E?

### PART B

#### ACCESS AND PARTICIPATION

1. When did you join this school?
  
2. I) was this school amongst your choices?  
Yes  No

II) If No, why did you join it?

.....  
.....

3. I) Have you ever applied for a bursary?

Yes [ ]      No [ ]

II) If Yes, were you awarded the bursary?

Yes [ ]      No [ ]

4. I) Do you have any outstanding fees?

Yes [ ]      No [ ]

II) If Yes, how much? Ksh.....

5. I) In case you are unable to pay fees are you usually sent home?

Yes [ ]      No [ ]

II) If Yes, how long does it take you to raise the required fees?

III) If the response is No, who pays the outstanding fees?

6. I) Are you aware of any student(s) who was (were) admitted to your school but failed to take up the chance?

Yes [ ]      No [ ]

II) If Yes, how many?

III) State reasons why they failed to join this school

.....

7. I) Have you ever repeated a class?

Yes [ ]      No [ ]

II) If Yes, indicate reasons for this

.....

8.1 The statements below describe some of the reasons why a student attending a public secondary school may opt not to apply for a bursary. Supplied also are five options

corresponding to these statements: strongly agree (SA), Agree (A), Undecided (U), Disagree (D) and strongly disagree (SD). Please tick the option that best suits your opinion on the statement given

	<b>SA</b>	<b>A</b>	<b>U</b>	<b>D</b>	<b>SD</b>
Lack of information on when to apply	( )	( )	( )	( )	( )
Amount is too little	( )	( )	( )	( )	( )
Amount always delays	( )	( )	( )	( )	( )
Certainty of not being awarded	( )	( )	( )	( )	( )
The application procedure is too tedious	( )	( )	( )	( )	( )

8.2 The statements below regard bursary allocation awarded to students attending a public secondary school. Please tick the appropriate answer.

	<b>SA</b>	<b>A</b>	<b>U</b>	<b>D</b>	<b>SD</b>
Bursaries offset much of the beneficiary's school fees.	( )	( )	( )	( )	( )
Bursary allocation is awarded to beneficiaries in time	( )	( )	( )	( )	( )
Beneficiaries of bursaries are rarely sent away for school fees	( )	( )	( )	( )	( )

8.3 (i) Are you in need of financial assistance?

*Thank you for your participation*

#### **APPENDINDIX IV: Interview Schedule for Head Teachers**

1. What is the category of your school?
2. What has been the ranking of your school in K.C.S.E for the last four years nationally?
3. I) During form one selection, are there any students who fail to take up their chances in your school?  
II) If Yes, what is the main reason for this?
4. I) Are there any students in your school who have fee problems?  
II) If Yes, state what happens to those students whose parents are unable to pay school fees?
5. I) Do you have data on the number of needy students in your school?  
II) If Yes, please state the number
6. Are there any students who have dropped out of school because of inability to pay school fees?
7. Do you provide information to your students about the existence of a government bursary scheme?
8. Do you consider the bursaries advanced to the students adequate to finance their academic programmes?
9. Suggest ways of improving bursary scheme to ensure retention at the secondary school level.
10. Is there any additional source(s) of finance open to students?

**APPENDIX V: Interview Schedule for Constituency Committee Members**

1. What is the number of students who have applies for bursaries in the last four years?
2. What is the number of students considered for bursary awards for the last four years
3. State the criteria used in awarding bursary to students  
.....  
.....
4. Do you consider the amount of money awarded as bursary to students adequate to meet their fee requirements?
5. Are students who get or fail to obtain bursary allowed to appeal against the committee decision?
6. What criteria are applied in determining what amount of bursary should be given to each individual student?  
.....  
.....
7. What are your sources of finance?  
.....  
.....
8. I) Is your level of finance adequate to offer safety nets to the needy students?  
II) If No, What are your future plans of cushioning the vulnerable?



**APPENDIX VII : Table 1.3: Student distribution**

<b>Name Of School</b>	<b>No. Of Head Teachers</b>	<b>No Of Students</b>
Bukar Secondary School	1	331
Sergoit High School	1	335
Chembulet Secondary School	1	327
Chemirmir Mixed School	1	326
St. Michael Secondary School	1	329
Kamariny Boys School	1	328
Kipsigak Girls Secondary School	1	328
St. Teresa Girl Secondary	1	336
Kapkoimur Secondary School	1	329
Chebonet Mixed School	1	332
Kiplus Secondary School	1	329
<b>TOTAL</b>	<b><u>11</u></b>	<b><u>3630</u></b>

*Source: Researcher (2014)*

## APPENDIX VIII: BUDGET

<b>ITEMS</b>	<b>KSHS</b>
Stationery	20,000
Travelling expenses	10,000
Telephone charges	3,000
Typing	4,000
Computer services	5,000
Subsistence allowance	6,000
Overhead expenses	<u>2,000</u>
<b>TOTAL</b>	<b><u>50,000</u></b>

## APPENDIX IX: MAP OF KAMARINY AREA

