

**EFFECTIVENESS OF CONSTITUENCY BURSARY FUNDS IN  
ENHANCING RETENTION OF STUDENTS IN SECONDARY  
SCHOOLS IN MANYATTA CONSTITUENCY, EMBU WEST  
DISTRICT**

**BY**

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### **Declaration**

This project is my original work and has not been presented for examination in any other university.

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## **DEDICATION**

To my family

Who have been so supportive and bearing;

Has been a pillar of strength, always encouraging me to cruise on.

## **ACKNOWLEDGEMENTS**

I sincerely thank my Creator, the Almighty God, who gave me the physical, mental strength and good health to undertake and accomplish this work.

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I wish also to acknowledge all my respondents who included secondary school principals, and heads of department, DEO, AEOs and Chief in Embu district.

God bless you all.

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## ACRONYMS AND ABBREVIATIONS

<b>AIDS</b>	-	Acquired Immune Deficiency Syndrome
<b>ASAL</b>	-	Arid and Semi Arid Land
<b>CBC</b>	-	Constituency Bursary Committee
<b>CDF</b>	-	Constituency Development Fund
<b>DEO</b>	-	District Education Officer
<b>EFA</b>	-	Education for All
<b>FTI</b>	-	Fast Track Initiative
<b>GDP</b>	-	Gross Domestic Product
<b>GER</b>	-	Gross Enrolment Ratio
<b>GoK</b>	-	Government of Kenya
<b>HIV</b>	-	Human Immuno-Deficiency Virus
<b>KESSP</b>	-	Kenya Education Sector Support Programme
<b>MDG</b>	-	Millennium Development Goals
<b>MoE</b>	-	Ministry of Education
<b>NGO</b>	-	Non-Governmental Organization
<b>OECD</b>	-	Organization of Economic Co-operation and Development
<b>PEPFAR</b>	-	President's Emergency Plan for AIDS Relief
<b>SPSS</b>	-	Statistical Package for Social Sciences
<b>SSA</b>	-	Sub-Saharan Africa
<b>TIQET</b>	-	Totally Integrated Quality Education and Training
<b>TSC</b>	-	Teachers Service Commission
<b>UPE</b>	-	Universal Primary Education
<b>USAID</b>	-	United States Agency for International Development

## **ABSTRACT**

The Ministry of Education increased the allocation of secondary school bursaries from Kshs 204.5 million in 1997/1998 financial year to Kshs 800 million in 2006/2007 financial year (Republic of Kenya, 2005a). This represented an increase of 397 percent over the 10-year period. Despite this huge investment to assist the poor access secondary education, a large number of children do not access secondary education on completion of primary education. An even larger number of students are not sustained in the schools once they are enrolled. Most of them drop out of schools in their second or third year (Republic of Kenya, 2005b). The Constituency Bursary Fund (CBF), which was formally referred to as Secondary School Education Bursary Fund (SEBF), was established in 1993/4 financial year. The objective of the fund was to reduce the financial burden of poor families in financing secondary education. CBF aims to cushion the country's poor and vulnerable groups against the high and increasing cost of secondary education, therefore reducing inequalities. It is therefore necessary that an assessment be carried out to determine the efficiency of the Constituency Bursary Fund with a view of making its allocation better and more targeted to enhance retention of needy students in secondary schools. Based on this, the purpose of the study was to assess the effectiveness of the Constituency Bursary Fund in enhancing retention in secondary schools. The study was conducted in Manyatta Constituency of Embu District and adopted a descriptive survey research design. Ten public secondary schools from the total of 17 schools in the area were randomly selected for study. The respondents for this study included two members of the Constituency Bursary Committee, all the 10 school principals from each of the schools, 100 students, ten from each school, Embu District Education Officer, and two area chiefs were used for the study. Two types of research instruments; questionnaires and interview schedules, were used for data collection. Descriptive statistics such as percentages and frequency distribution were employed to analyze the quantitative data. Qualitative data was placed under themes consistent with the research objectives and conclusions made based on trends and patterns of responses. The study established that despite the fact that students applied for bursary funds, not all deserving cases benefited from the funds. This was mostly because the funds allocated to schools were not enough to meet the needs of all the deserving students. The study established that bursary schemes slightly improved secondary school retention rates, which means that there may be other factors affecting retention rates other than the availability of funds. The study also found out that the most common challenges faced in the distribution of bursary funds were lack of transparency, lack of clear procedures, corruption and that the process was slow and cumbersome. The study recommended that there should be fair distribution of funds to schools, as girls tend to have more needs than boys, and this should be taken into consideration when distributing funds; the process has been known to be slow and cumbersome, so it should be made faster so that the purpose the funds were intended for are realized in good time and also the categories and procedures for distribution of bursaries should be clearly stipulated.

# **CHAPTER ONE**

## **INTRODUCTION**

### **1.1 Background to the Study**

It is widely accepted that investment in education is a necessary condition for development to be realized. Social and economic development benefits directly and indirectly from mass participation in schools. There is an extensive and highly nuanced literature demonstrating linkage between investments in education and training and desirable development outcomes (Lewin, 1994). From the 60s, studies that relate economic growth and educational investments have been conducted. More recently, there has been literature that correlates levels of education with improved productivity in agriculture and industry. Other studies have also concluded that social benefits in health, nutrition, fertility, and gender equity are also closely related to increased levels of education. Improved access to education can also reduce income inequality.

Evidence on the effects of education on development is widely reviewed (World Bank, 1995; Psacharopoulos, 2001; Lewin, 1994). The findings of these reviews generally support the positive impact of educational investment on development. As primary schooling becomes more universal the focus is shifting to the exploration of the benefits of secondary schooling. Lewin (1994), in his analysis of financing secondary education states that in many developing countries, the problem of financing secondary schools is acute. Participation rates remain low and are not growing in most of the countries. Where they are smallest, costs at secondary level are often high and are unsustainable if participation is to be increased. Employment based on new production methods, the improvement of mature technologies and the

widespread diffusion of information and communication technologies increasingly demands workers with more than basic education (Lewin, 1994).

Kenya is no exception to the situation as analyzed above. The secondary education sub-sector faces a number of challenges which constraints growth. First, there is the problem of high cost of education, which is five times that of primary education. Second, the high poverty levels in the country limit access and retention. Transition rates from primary to secondary schools nationally stood at 47% in 2005 (Republic of Kenya, 2005a). The objective of the Kenya Education Sector Support Programme (KESSP) (Republic of Kenya, 2005a) was to achieve a transition rate of 70 percent by 2008. According to the Ministry of Education (2009), this objective was surpassed with the current transition rate being slightly above 71%. Thirty percent of the students who enrol in secondary education drop out before they complete the secondary cycle (Republic of Kenya 2005). Third, the Gross Enrolment Ratio (GER) is very low with a national average of only 29.8% in the year 2004. This rose to 36.7% in year 2007. This is due to the fact that many parents cannot afford to pay for secondary education whose costs are comparatively higher than those of primary education.

The Government of Kenya has recently introduced free secondary education whose main objective is to improve access, retention and quality of secondary education. Although the programme will certainly improve access to secondary education, it will however be difficult to ensure a retention rate of 100%. This is because the indirect costs of secondary education are enormous and many parents cannot afford owing to the high poverty levels in the country. The government subsidies for secondary education do not cover hidden costs of education such as transport, uniform, lunch and boarding fees. These costs are still high for poor households who may find it

difficult to maintain their children in secondary schools. An analysis by Oyaro (2008) of enrolment in the last grade of primary and the first grade of secondary education revealed that while the poorest 20 percent of children in the last grade of primary school make up 12 percent of the grade, the presence of this group decreases to seven percent in the first year of secondary school. Furthermore, when the first grade of secondary school is connected to the official age, the richest 40 percent of children make up as much as 74 percent of children in the official age range in the grade. Oyaro's analysis showed highly skewed access to secondary education in favour of the rich.

Education financing encompasses all financial outlays by Central, Local Government, the Private Sector, NGOs, households, communities and bilateral and multilateral partners. The average government spending on education and training ranged between 5 and 7% of GDP in 2003 (Republic of Kenya, 2003). The recurrent Government expenditure on education has been higher than any other social service undertaking over the years. For example, in 2003/2004 financial year, the share of budgetary allocation to education in the social services sector was 73%. The Ministry of Health was allocated 19%, Ministry of Home Affairs, National Heritage and Social Services 6%, and Ministry of Labour and Human Resource Development was allocated 2% (Republic of Kenya, 2004). The recurrent budget in the Ministry of Education rose from 35% of public recurrent budget in 2000 to 39% in 2007.

Although secondary school enrolment improved from a partly 30,000 in 1963, to 1,030,080 in 2006 (Republic of Kenya 2006) a large number of children who are supposed to be in school are not enrolled. According to the 1999 census, a whopping 2.8 million secondary school age children were not enrolled during the period of the census. The situation highlighted above points a grim picture as far as the secondary

education sub-sector is concerned. It is expected that the demand for secondary education will increase substantially since there are more pupils enrolled in primary schools currently than there were 10 years ago. Currently, data from the Ministry of Education shows that primary to secondary school transition rate has been surpassed, at 71%. However, 30% of the students who enrol in secondary education drop out before they complete the secondary cycle (Republic of Kenya 2005). It is therefore doubtful whether those demanding for secondary education will be enrolled owing to the high cost of secondary education and the high poverty levels in the country.

The Government has put in place strategies to enhance retention and reduce costs of education for poor parents at secondary and university levels. These strategies are ring fenced during the budgetary allocation process as the core poverty intervention programmes. The secondary schools Constituency Bursary is one such strategy meant to enhance needy students' retention in secondary education. The system should therefore be made efficient to ensure that needy cases are identified and supported financially in order to boost their retention in secondary education.

The constituency bursary fund (CBF), which was formally referred to as Secondary School Education Bursary Fund (SEBF), was established in 1993/4 financial year. The objective of the fund was to reduce the financial burden of poor families in financing secondary education. CBF aims to cushion the country's poor and vulnerable groups against the high and increasing cost of secondary education, therefore reducing inequalities. It also aims to increase enrolment in (and completion of) secondary school. In summary, the objectives of the bursary scheme in Kenya are:

- (a) To increase access for poor households to secondary schools.
- (b) To ensure retention of those who enter secondary schools.
- (c) To enhance completion by those who enter secondary schools.

- (d) To reduce disparities and inequalities in the provision of secondary school education.

The bursary fund is not based on a fixed share of the national budget. Allocations vary depending on the Ministry of Education's annual provisions, the number of students enrolled in secondary schools within each constituency, national secondary school enrolments and poverty indices. Since 2003/2004, the bursary fund has been coordinated by Constituency Bursary Committees, which screen potential beneficiaries, coordinate and disburse the funds, and prepare reports to the Ministry of Education. The government has continued to increase bursary allocations for secondary schools over the period. Bursary allocations rose from KShs 20 million in the period 1996-97 to KShs 800 million for the period 2008-09.

A study on the Secondary School Bursary Scheme by Njeru and Orodho (2003) identified major weaknesses of the secondary school bursary scheme as lack of transparency, inadequacy of funds, fluctuations of the amount allocated, disbursement delays; lack of uniform criteria for identification of the poor students and inadequate equity consideration.

From the financial year 2003/2004 however, the bursary funds disbursements methods were changed and funds are now disbursed directly to the 210 constituencies at District Level. Each Constituency gets an initial one million Kenya shillings and the remaining amount is disbursed on the basis of Constituency students' enrolment and District Poverty Index. The funds are then disbursed to the selected students in secondary schools (Republic of Kenya 2004).

The Ministry of Education is determined not only to increase access to secondary education but also to ensure that a large number of students enrolled are retained in

the school system to complete the cycle. This visionary objective can only be achieved where there is a sustained policy to finance education for the poor and the vulnerable.

Despite the efforts by the government to improve access and retention of students in secondary schools, evidence shows that access to secondary education is still highly skewed in favour of the rich (Oyaro, 2008). Okoth (2009) also shows that thousands of poor students in the country do not benefit from CBF leading to dropout. Okoth argues that there are loopholes in the allocation of bursaries. There was therefore need to assess the effectiveness of CBF against one of its main objectives “to ensure retention of those who enter secondary schools.”

## **1.2 Statement of the Problem**

This study assessed the effectiveness of the Manyatta Constituency Bursary Fund in disbursing bursary to needy students to enable them be retained in secondary schools. One of the key objectives of the Constituency Bursary Fund is to ensure retention of those who enter secondary schools. However, even with the bursary fund in place, the country still experiences problems such as, low transition rates from primary to secondary schools and rising cases of school dropout. This is an indication that despite the government’s continued increase in bursary fund allocation, from Kshs 204.5 million in 1997/1998 Financial Year to Kshs. 800 Million in 2006/2007 Financial Year (Republic of Kenya 2007), a large number of needy students do not access the funds. According to the Manyatta Constituency Development Committee Report (2006), despite the fact that a lot of money is awarded to the constituency as bursaries, many students are transferring from public boarding to public day secondary schools or dropping out all together. No studies have been carried out in

Manyatta to establish the effectiveness of Constituency Bursary Funds in enhancing needy students' retention in secondary schools education. The study therefore assessed the effectiveness of CBF in enhancing retention of students in secondary schools in Manyatta Constituency.

### **1.3 Purpose of the Study**

The purpose of the study was to assess the effectiveness of the Constituency Bursary Fund in enhancing needy students' retention in secondary schools education. Specifically, the purposes of the study was to assess the modalities used to disburse bursaries and to establish the effect of the constituency bursary fund on retention of students in secondary education.

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

The specific objectives of the study were:

- a) To examine whether the criteria given by the Ministry of Education on bursary allocation was being adhered to.
- b) To establish the effect of Constituency bursary fund on student retention at the secondary school level in Manyatta Constituency of Embu District
- c) To assess the major constraints in bursary disbursements in the study area
- d) To seek suggestions on improvements needed to make the bursary scheme more successful in retaining needy learners in secondary schools.

### **1.5 Research Questions**

The following research questions guided the researcher in order to achieve the above stated objectives

- a) To what extent was the criteria given by the Ministry of education on bursary allocation adhered to in Manyatta Constituency?
- b) What systems of internal checks and audit are employed to ensure compliance with CBF allocation procedures?
- c) To what extent has the Constituency bursary fund contributed to the retention of students in secondary schools?
- d) What constraints are faced in bursary fund disbursements?
- e) What improvements can be made to enhance efficiency of the bursary scheme?

## **1.6 Significance of the Study**

The Ministry of Education is committed to achieving its objective of providing affordable secondary education, which can guarantee increased transition from primary to secondary schools. The Constituency Bursary scheme was specifically adopted in order to devolve the disbursement of funds and make the system more transparent and accountable. This study therefore provides useful data, which can be used by planners in the Ministry of Education to assess the efficiency and effectiveness of the Constituency Bursary Scheme. The study also provides suggestions that can be adopted to improve the system of bursary disbursements and ultimately increase retention to secondary education. The study also contributed to the body of knowledge on public devolved funding of education.

## **1.7 Assumptions of the Study**

In this study, it was assumed that:-

- a) The Constituency Bursary Committee was in place and functional.
- b) The data on Bursary beneficiaries was readily available in Schools

- c) Inadequacy of disbursed CBF was a key determinant of school drop-outs; students who are allocated CDF bursary are unlikely to drop out and vice versa
- d) The respondents gave honest and true answers to research questions.

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

The study was carried out in Manyatta Constituency of Embu District. Only public secondary schools within the constituency were targeted. Private secondary schools were not included in the study because students in these schools are not eligible to the constituency bursary fund.

### **1.9 Limitations of the Study**

The study had the following limitations:

- (a) The study was limited by the fact that respondents failed to give all the necessary information, especially the bursary fund committee members, who feared victimisation if found to have misappropriated the funds.
- (b) The study was also limited by the fact that, since data was collected from Manyatta Constituency only, findings cannot be generalized to the whole country.

### **1.10 Theoretical Framework**

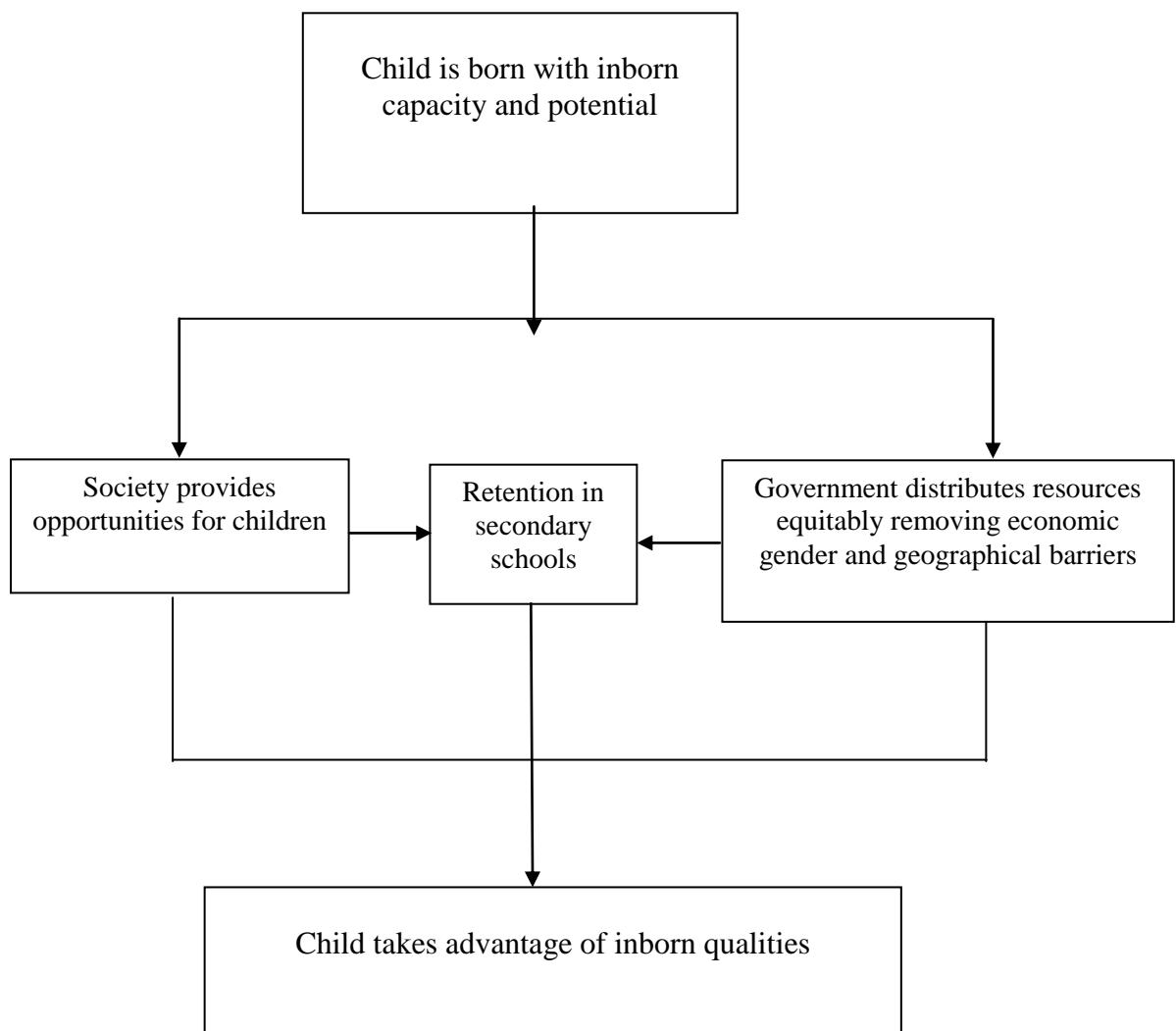
The theoretical framework for this study was derived from the Classical Liberal Theory of Equal Opportunity by Sherwin and Wood (1982) who asserted that one is born with a given amount of capacity, which to a large extent is inherited and cannot be changed substantially. Education systems should therefore be designed so as to remove barriers of any nature (economic, gender or geographical) that prevent bright students from lower economic backgrounds from taking advantage of inborn qualities

that accelerate them to social promotion. Retention to both primary and secondary education should therefore be determined by an individual's merit and not on social backgrounds.

The classical theory also states that social mobility will be promoted by equal opportunity to education. There is widespread belief that removing economic barriers and making more places available in secondary education and by increasing attendance in schools, ideal conditions could be created to implement the vision of equal opportunity where everybody has access to the kind and amount of education that suits his/her inherited capacity.

This theory was relevant to this study since the cost of secondary school education is at least five times that of primary education (Republic of Kenya, 2005b). Free Secondary education was introduced in 2008, the Kenya Government met only the cost of paying teachers in secondary schools and thus households had to meet other expenses such as operational, maintenance and development costs. This therefore led to inequality in access to secondary education (Republic of Kenya, 2005b). This theory can be summarized as indicated in Figure 1.1.

**Figure 1.1 Sherwin and Wood's Classical Liberal Theory of Equal Opportunity (1982)**



### 1.11 Conceptual Framework

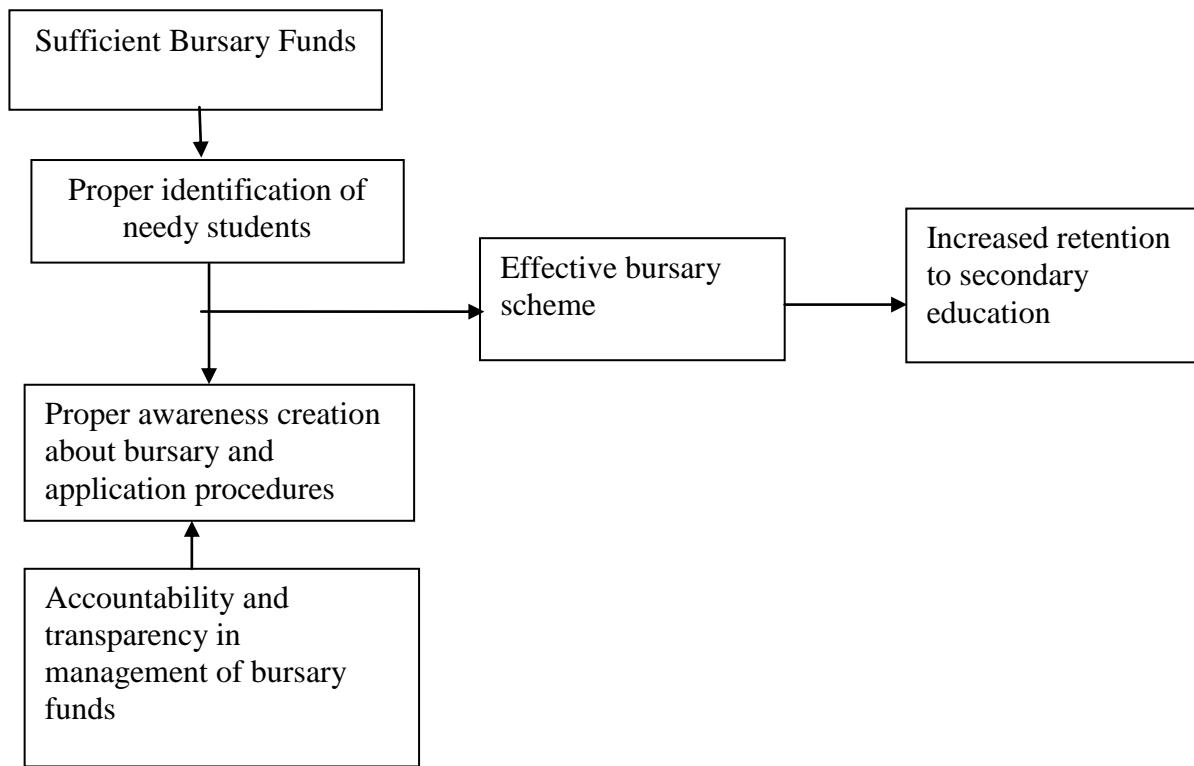
The conceptual framework for this study was derived from the theoretical framework.

Access and retention in secondary education is affected by various economic factors.

The poor can be assisted to access and be retained in secondary education through provision of bursaries. The rich on the other hand need to be assisted by making secondary education more affordable.

The conceptual framework therefore attempts to show how the poor can be assisted to ensure increased access and retention in secondary education. The Kenya Government has a central role to play to ensure that there is more awareness about the bursaries available, increase bursary allocation and put in place measures to audit to ensure compliance to guidelines. It is envisaged that where there is awareness about the CBF, the needy students will apply for bursary and this will ensure that they will be able to access and complete secondary education. The Constituency Funds can be made more effective through proper training of Constituency Bursary Committees members. Transparency was also guaranteed where there were regular checks/audits. Figure 1.2 presents the researcher's conceptual framework.

**Figure 1.2: Conceptual Framework**



\*Source: Researcher (2009)

The dependent variable for this study was the effectiveness of the Constituency Bursary fund in enhancing retention in secondary schools. The independent variables are adequacy of the bursary funds to meet the needs of all the needy students, criteria employed to identify and communicate to the needy students, and accountability and transparency with which the constituency bursary fund is managed. In addition to identifying the factors given above, the study also identified the constraints and improvements needed to improve CBF.

## **1.12 Definitions of Operational Terms**

**Bursary:** Also referred to as the Constituency Bursary Fund, this refers to the government financial allocations to each Constituency, which is aimed at assisting children from poor households pay for the cost of secondary education.

**Dropout:** Any student who leaves secondary school without completing the level of education.

**Effectiveness:** This refers to the efficiency and success of CBF in meeting its objective of enhancing retention of students in secondary schools.

**Equity:** Deliberate elimination of all forms of discrimination and introduction of fairness and social justice in allocation of educational opportunities.

**Gross Enrolment Ratio:** The number of students enrolled in a secondary school as a proportion of corresponding appropriate age population in the country.

**Poor:** Students who are genuinely unable to pay the secondary school fees because of household level of poverty.

**Retention:** Refers to the ability of students to remain and progress in school until they complete their secondary school life cycle.

## **CHAPTER TWO**

### **LITERATURE REVIEW**

#### **2.1 Introduction**

This chapter covers a review of literature related to the study. The chapter covers the following themes:

- i. Expenditure in Education around the world
- ii. Expenditure on Education in Sub-Saharan Africa
- iii. Challenges facing Secondary education in Kenya
- iv. Government Expenditure on Education in Kenya
- v. Current Secondary Funding Structures
- vi. Secondary School bursary Scheme
- vii. Procedure of Bursary Allocations
- viii. Studies on the Impact of the CBF
- ix. Summary of the literature reviewed

#### **2.2 Expenditure on Secondary Education around the World**

Many low enrolment countries in SSA cannot increase participation at secondary level with current cost structures. Where secondary schooling has costs per student five or more times those of primary, and 30-60% of GDP per capita, secondary schooling cannot be universalized without requiring that most if not all of the education budget is met by the government (Lewin 1994). Even if school places were provided, the high direct costs of participation (predominantly fees) would exclude

most households. Reforms are needed that address the problems of high public costs per student, and high direct costs.

According to Brissed and Cailloids (2004), in the OECD countries, the basic principles that guide the policy of financing secondary education are related to;

- a) The need to facilitate access to basic and compulsory education
- b) Equality of opportunity
- c) Freedom of education choice

OECD countries spend a large proportion of their national budget and GDP on education. The justification for this is that education contributes to development and must therefore be provided to all. In the 1980's and 1990's most of these countries started rationalizing their public spending on education following a slow down in economic growth occasioned by the oil crisis. More efficient ways of distributing resources between as well as within sectors were applied. A number of reforms such as decentralization of financing and management of public services including education, new ways of allocating resources and a certain amount of deregulation and privatization.

State schools do not charge tuition fees until the end of compulsory education in order to facilitate access to secondary education. A tuition fee-free school is to be accessible to every young person wherever he or she lives. Many of these countries include textbooks and transport as part of the free education for all students in public schools up to the end of compulsory education and in some cases up to the upper secondary education (Brissed and Cailloids, 2004). Although the government meets most of the costs, secondary education is not entirely free. Families are required to pay for meals school supplies extra-curricular activities and uniforms at both the

lower secondary and upper secondary levels. In addition to these, families also meet the costs of text books and transportation for students in upper secondary school level. Families which may not afford these costs generally receive a scholarship and/or benefit from a reduction in cost. A tax credit or rebate is also provided for families with children in schools (Brissed and Cailloids, 2004).

Since most of the countries under OECD have embraced the principle of freedom in the choice of education, private schools mostly with religious affiliation exist alongside the public schools. Private schools are therefore complementary to the public school scheme in offering an alternative to public education. Many private schools are subsidized and receive public funds. This therefore creates competition between public and private schools. In order to promote equality of opportunity, financial assistance is available to low income families who cannot meet voluntary fees, meals or transportation costs. Attendance to private schools is therefore not restricted to the well-off families since private schools are highly subsidized.

Most countries of the OECD spend between 11 and 13% of their overall budget on education. They also spend a high proportion of their national resources on education which ranges between 4.92 and 7.2% of the GDP. In the European Union countries the largest share of public funding is allocated to secondary education which receives between 40 and 60% of all funds earmarked for educational institutions.

State responsibility for school funding is shared between different levels of government namely Central (Federal), Regional and Local levels (Municipality or school districts). Schools are funded using well spelt out criteria that ensures fairness in the distribution of funds between schools (Brissed and Cailloids, 2004). Different countries however use different methods to work out the funding

requirements for each school. OECD countries spend between 23 and 24% of their GDP per capita on each secondary student every year. The unit costs of secondary education in these countries have been increasing over the years. Efforts have been made by the respective governments to reduce costs through decentralization and increased accountability.

Brissed and Cailloids (2004) have identified three factors which influence unit costs in these countries. First the student : teacher ratio in most of the OECD countries has been reducing due to declining school age population and pressure from the trade unions to reduce the number of pupils per class. Secondly, the salary levels of teachers also influence the unit cost. It is however important to note here that salary levels for teachers in OECD countries are not high when compared to salaries in other sectors. Thirdly, the non-salary costs in most of these countries are higher with an average of 20% of all recurrent costs in primary and secondary education.

A comparison of the unit cost of education between primary and secondary indicates a much higher cost in secondary education. This is because secondary school teachers are paid more, they are specialized per subject and teach fewer hours, costs for science and technology equipment are higher and there are also more costs for non-teaching staff than there are in primary education. Most of the countries therefore spend between 30 and 50% more on secondary education than they spend on primary education.

### **2.3 Expenditure on Education in Sub-Saharan Africa**

In most countries in Sub-Saharan Africa, secondary education benefits the better off urban groups of society but remains largely inaccessible for rural populations, with girls at a particular disadvantage. The GPI for junior and secondary education for

2003 was 78. The EFA/MDG target of eliminating gender disparities by 2005 has not been reached. Demand and supply factors interact to become long-lasting obstacles to girls' enrolment and retention. Many poor children never enter primary school or drop-out before reaching the final year. For those that manage to complete and then are successful in the secondary school selection process, the obstacles to enrolment remain formidable. Tuition and other formal and informal cost are often unaffordable. Secondary schools frequently are located in larger towns and cities or are boarding schools, implying cost that poor rural parents can ill afford. Where scholarships are available they are often poorly targeted. Opportunity cost for students of secondary school age are often significant, while societal pressures and tradition often militate against poor children, especially girls, who want to continue their education at the secondary level (SEIA Report 2007).

Enrolment growth in most low-income countries in SSA has outpaced the increase in resources available for secondary education. Given the numerous competing demands on constrained public resources, many governments find it impossible to mobilize sufficient funds to accelerate the development of secondary education, while fees and other private cost result in the *de facto* exclusion of poor students. In several SSA countries with substantial commitments to universalizing primary education, 50% or more of recurrent expenditure is allocated to primary schooling. Higher education typically absorbs 15-20%. This leaves some 20-25% of recurrent education expenditures for secondary education, a share that is unlikely to increase much (SEIA Report 2007).

Developing countries with low secondary enrolments, like most African countries, cannot finance substantially higher participation rates from domestic public resources with current cost structures (Lewin and Caillods, 2001). To respond to the increased

demand for secondary places, while constrained by the public funding, countries have spread the same resources over larger number of students, attempted to mobilize private funding or most often did both. Exacerbated by inefficiencies in the deployment of resources, essential inputs often are in short supply resulting in shortages of textbooks, instructional materials and supplies, poorly stocked libraries and double or triple shift use of facilities. In addition, as government funding stagnates, parental contributions have become an essential complement to public funding (SEIA Report 2007).

The high cost burden of secondary education is also associated with the fact that in SSA per student cost in secondary education is much higher than in primary education. Secondary per student cost is a much higher multiple of primary per student cost in SSA than in OECD and middle income countries. On average, unit cost at junior secondary level are about three times and at senior secondary six times greater than at the primary level. Among countries with a GNP per capita below US \$ 1,000, Anglophone Africa spends 6.6 times as much on secondary students than primary students and Francophone Africa spends 3.3 times as much when compared to Latin America, which spends 1.6 times more. The reasons lie in a combination of lower pupil-teacher ratios, higher salary costs, boarding subsidies, and larger numbers of non-teaching support staff. The main cost variable is however the cost of teachers. Yet teacher deployment is often wasteful and ineffective. Moreover, in some countries teacher salaries are unsustainable multiples of GNI per capita. In others, they are so low that teachers are almost forced to find a second job or leave the profession. In many countries, the output of teacher training programs is insufficient to meet the demand. In others, the government cannot afford to hire all those that graduate. As a result, untrained teachers often make up 20% of the cadre and can

account for as much as 50% with most working as temporary or contract teachers. Yet, teacher salaries often crowd out allocations for other expenditures, resulting in severe shortages of textbooks and instructional materials, adversely affecting the effectiveness of instruction (SEIA Report, 2007).

The report of Secondary Education in Africa Initiative (SEIA 2007) concludes that the main problem facing secondary education in SSA is the Private cost of public schooling. This comprises of official government tuition and boarding fees, contributions to school management committees as well as costs such as textbooks, learning materials, school supplies, private tuition, transportation and clothing. These costs are significant in many countries. It is therefore not surprising that faced, in addition, with severe competition for places and concerned about the perceived decline in the quality of instruction, transmission of social values and safety in government schools, many parents enrol their children in private schools. It is estimated that 13% of the secondary students in SSA are enrolled in private institutions. In reality this proportion is likely to be significantly higher, since many private schools are not registered. There are large differences between private schools: some are high cost elite schools, while others are traditionally church sponsored schools that usually offer programs of acceptable quality at medium or low cost. More recently, an increasing number of for profit institutions offer programs of varying but often low quality and cost.

Due to the limited financial support by the governments, households are shouldering a large share of the cost of secondary institutions. In Kenya, Uganda, and Tanzania more than half the total cost per student is financed through fees and other contributions (Lewin, 2006). In Zambia, private sources of income accounted for 48% of total expenditure at government urban high schools, 33% at government rural high

schools, 52%, and 57% in grant aided urban and rural high schools, respectively. In Francophone countries, the privately funded share is usually less, but represents still 30% in Benin for example. In a region where GNI per capita in a majority of countries is less than \$500, participation in secondary education with a cost equivalent of US\$ 200-3000, represents a heavy financial burden, even for middle income families. In many countries fees and private cost often make it impossible –in the absence of effectively targeted financial support- for the few poor children that complete primary education to enrol in secondary school (Lewin, 2006) further skewing participation towards wealthy households.

#### **2.4 Challenges Facing Secondary Education in Kenya**

In Kenya, as in other developing countries, the provision of quality education and relevant training to all is the *sine qua non* for achieving the national development agenda. The government of Kenya has therefore focused its main attention on formulating appropriate education policies to ensure maximum development of the human resources who are essential for all aspects of development and wealth creation through industrialization. All education stakeholders recognize that quality education at all levels will enable Kenyans to utilize their natural resources efficiently and effectively in order to attain and maintain desirable lifestyles for all Kenyans (Munavu, Ongutu, and Wasanga, 2008).

There are, however, many challenges which threaten the sustenance of a robust educational regime in Kenya. The key challenges include low enrolment and retention rates, constricted access and equity at higher levels, establishment and maintenance of quality and relevance, and myriad inefficiencies in managing the limited resources allocated to the education sector (Republic of Kenya, 2005).

Implementation of the free primary education (FPE) has been responsible for the recent upsurge in the secondary school enrolments since 2003. Enrolment trends in secondary schools show a steady growth from 30,000 in 1963 to 860,000 students in 2003, and to over 1 million in 2006 (Munavu et al., 2008). Similarly the number of public secondary schools increased from 151 in 1963 to 3660 in 2005 (Republic of Kenya, 2005). One of the factors limiting growth in Gross Enrolment Ratios (GERs) at the secondary level is the limited number of secondary schools compared to the number of primary schools. The current gapping mismatch between the capacities at these levels is approximated by comparing the number of primary and secondary schools. The number of public primary schools was 18,081 in 2003 compared to 3,660 public and 641 private secondary schools in the same year (Republic of Kenya, 2005). This mismatch will pose a major challenge in implementing the declared government policy of free secondary education with effect from 2008 (Munavu et al., 2008).

Previous studies have shown that secondary education in Kenya is faced with a number of challenges. These challenges fall under the various school management task areas, which, according to Okumbe (2001), include management of staff personnel, pupils, school finance, physical and material resources, and the curriculum. A study carried out by Mbaabu (1983) revealed that lack of physical facilities, materials, equipment and tools were among the major problems that primary school headteachers are faced with in Kenya. The study found out that in most schools classes had over 50 children. This study revealed that free education at the primary level brought about problems related to over-enrolment, lack of physical facilities, and inadequate teachers.

Olelbo and Cameroon (1986) indicate that school principals face increasing administrative difficulties. These include inadequate and badly constructed building; shortage of books and equipment; lack of proper school furniture particularly desks; poor or sometimes non-existent maintenance and repairs; untrained and half trained teachers who seldom stay long; over-crowded classrooms; poor communications and few supporting services especially health services. As a result the administration of schools has become one of the most taxing jobs in the whole education system.

In relation to the structure of physical facilities, Olelbo and Ross (1992) indicate that the development efforts of school headteachers have sometimes been frustrated because of lack of space for extension of the school, lack of housing for teachers and worse still lack of essential facilities like desks, chalk, books and so on. Some schools do not have adequate classrooms and where they exist they are sometimes in very poor condition, which are hazardous to students and staff.

Other key challenges facing education in Kenya relate to the attainment of Education for All (EFA). The key concerns for the government are access, retention, equity, quality and relevance, and internal and external efficiencies within the education system (Achoka, Odebero, Maiyo and Mualuko, 2007). The effectiveness of the current 8-4-4 structure and system of education has also come under increasing scrutiny in light of the decline in enrolment and retention particularly at the primary and secondary school levels. The Government has shown her commitment to the provision of quality education and training as a human right for all Kenyans through the introduction of Free Primary education in 2003 and Free Secondary Education in 2008.

The launch of Free Secondary Education (FSE) in 2008 was meant to address illiteracy, low quality education and low completion rates at the secondary level, high cost of education and poor community participation (Republic of Kenya, 2005). Unlike the FPE initiative, which has reference to enormous conventions, resolutions and literature, FSE initiative was triggered by the politically charged climate that engulfed the country during the 2007 general election, which implies that the country may not have been very prepared for its implementation. However, there was government commitment to increase transition from primary to secondary by seventy percent in all districts (Ohba, 2009). The FSE policy is in line with the government commitment to ensure that regional special needs and gender disparities are addressed (Ohba, 2009). What is not clear is whether FSE is capable of ensuring high levels of retention at the secondary school level.

According to the Free Secondary Education policy, the government is expected to meet the tuition fees of KShs 10,265 per students, while the parents are required to meet other requirements like lunch, transport and boarding fees for those in boarding schools, besides development projects. In order to cushion those from poor households from dropout due to lack of boarding and associated costs, the constituency bursary fund is still operational in every constituency in the country. The study will assess the effectiveness of the Constituency Bursary Funds in enhancing needy students' retention in secondary schools education.

## **2.5 Government Expenditure on Education in Kenya**

Education financing in Kenya has been a shared responsibility between the public sector and NGOs, religious organizations, development partners, communities and individuals (Wainaina, 2005). Between 1963 and 1974 due to the high demand for

primary education, communities were able to put up primary schools which they subsequently funded. These schools were however taken over partially by the government through payment of teachers' salaries while the communities were left to continue meeting other costs of running the schools (Wainaina, 2005). The government introduced free primary education up to standard four in 1974. This was to change in 1988 when the cost-sharing policy was introduced in education (Republic of Kenya, 1988). The cost-sharing policy required most costs in education to be met through partnerships between public sector and NGOs, religious organizations, development communities, individuals and private sector. Within this funding policy framework, overall government role included professional development, teachers' remuneration in public institutions, provision of infrastructure, administration and management, and provision of bursaries and scholarships for needy students (Republic of Kenya, 1988).

In 2003, Kenya introduced the Free Primary Education (FPE) policy with a view to meeting the goal of Universal Primary Education (UPE). This move led to a sharp increase in government spending in education. The average government spending on education and training, excluding the share by households, has ranged between 5 and 7% of the Gross Domestic Product (GDP) for the period 2000-2004 (Republic of Kenya, 1988).

According to Onsomu et al (2006), recurrent government spending on education has been higher than any other social sector. Education spending constitutes 73% of the social sector total expenditure. In addition, education recurrent budget has risen from 33% of public sector recurrent budget in 2000 to about 35% in 2005, with about 79% going towards administration and planning. Out of the 79%, 86% goes towards salaries and wages, especially for primary and secondary school teachers.

Furthermore, out of the total allocation to the Ministry of Education, 56% of the resources go to primary education (this figure is above the Fast Track Initiative (FTI) - benchmark of 50%), with about 86% of the fiscal resources to primary schools being used to pay teacher's salaries. Also, development expenditure has increased from 3.41% in 2001/02 to 8.02% in 2005/06 and more so since 2003 as a result of the implementation of FPE, leaving little allocation to other sub-sectors. According to Government of Kenya Expenditure Estimates both recurrent and development costs over a six year period from 2002 to 2007 increased by 46% from 283 billion in 2002 to 413 billion in 2007. Over the same period the share of budgetary allocation going to education increased from 19% to 23%.

The Ministry of Education had received on average 75% of allocations to recurrent expenditure in the social services sectors over the period (2002 – 2007). While these allocations had increased by 173%, that for the Ministry of Education had increased by 177% from 54 billion in 2002 to 95 billion in 2007. Funding to free primary education and revisions to teachers salaries account for a significant proportion of the increase in expenditure over this period (Onsomu, 2006).

The Government Expenditure Estimates indicates that in development expenditure, the trend is also similar to the earlier situation where the ministry of education is second only to the Ministry of Health. Allocations had also increased from a partly 825 million in 2002 to a high of 9.7 billion in 2006. Within the Ministry of Education, there was an increase on recurrent expenditure of 54% from 60 billion in 2002/2003 Financial year to 93.7 billion during the 2006/2007 Financial year. Out of this amount, 47% was spent on primary education alone and thus an indication that resource allocation has been skewed in favour of primary education over the same period.

Despite its importance in poverty reduction as highlighted earlier in this chapter, it is obvious that secondary education had not been given a lot of priority in terms of funding. The 1999 census indicated that 2.8 million youths who were supposed to be attending secondary education were out of schools (Republic of Kenya-2005). Though the Government of Kenya was concerned about the low transition rates from primary to secondary schools, the planned intervention measures could not make a lot of impact to ensure that more students attend secondary education. Table 2.1 below gives a breakdown of expenditure trends and projections of future expenses for selected vote heads in secondary education over a five year period.

**Table 2.1: Trends in Expenditure on Secondary Schools (Kshs in Millions)**

	2006	2007	2008	2009	2010	Total
Strategy development	30	10	0	0	0	40
Bursaries and scholarships	1,013	1,013	1,121	1,233	1,356	5,736
Grants to ASAL schools	223	200	250	300	300	1,273
School construction	150	300	300	300	300	1,350
Open/distance learning	50	200	130	100	100	580
Science equipment	244	315	374	415	456	1,804
Provision of ICT	250	400	400	400	400	1,850
<b>Total</b>	<b>1,960</b>	<b>2,438</b>	<b>2,575</b>	<b>2,748</b>	<b>2,912</b>	<b>12,633</b>

**Source:** Government of Kenya Estimates and Education Sector Support Programme Projections (2005)

Although the amount to be allocated to bursaries as indicated in Table 2.1, was to increase by 133% from 1 billion in 2006 to 1.3 billion in 2010, other programmes of funding were not to be increased substantially. Table 2.2 below indicates the planned expenditure for pro-poor programmes in the Ministry of Education.

**Table 2.2: Trends in Financing Core Poverty Programmes in Secondary Schools  
(Kshs in Millions)**

	2006	2007	2008	2009	2010	Total
Bursaries	800	800	1,121	1,231	1,356	5,308
Grants to ASALs	165	200	250	300	300	1,215
Pockets of poverty	45	50	55	60	0	210
Classrooms - ASALs and slums	1,141	300	300	300	300	2,341
Equipment to targeted schools	170	316	374	415	400	1,675
<b>Total</b>	<b>2,321</b>	<b>1,666</b>	<b>2,100</b>	<b>2,306</b>	<b>2,356</b>	<b>10,749</b>

**Source:** Government of Kenya Estimates and Education Sector Support Programme Projections (2005)

It was however noted that the Government had planned to increase allocations to pro-poor expenditure programmes as Table 2.2 above indicates. Of the 12.6 billion that was to be allocated to secondary education, 10.3 billion was to be spent on pro poor programmes.

## 2.6 Current Secondary Education Funding Structures

### 2.6.1 Free Secondary Education

The Government of Kenya introduced the policy of Free Secondary Education in January 2008. The policy was introduced in order to ensure increased access to and retention in secondary education (MoE Circular, 2008). Under this policy all public secondary schools were to receive Kshs. 10,265 to cater for tuition expenses only. Payment of support staff salaries, co-curricular activities, repair and maintenance and administrative expenses were to be catered for by the parents or guardians. The Ksh. 10,265 was to be allocated in the various vote heads as tabulated in the table below:

**Table 2.3 Free Secondary Education Vote-head Allocation per Student (2008)**

<b>Vote Head</b>	<b>Amount (Kshs)</b>
Tuition	3,600
Personnel Emoluments	3,965
Repairs and Improvement	400
Administrative costs	500
Electricity Water and Conservancy	500
Activity Fees.	600
Local Travel and Transport	400
Medical	300
<b>Total</b>	<b>10,265</b>

**Source:** Ministry of Education Circular (2008)

### **2.6.2 Secondary School Bursary Scheme**

The Secondary Schools Bursary Scheme was introduced in the 1993/1994 financial year with the objective of cushioning the poor households from the impact of poverty, inflation and the effects of HIV/AIDS (MoE, 2003). According to the Ministry of Education (2005), the major objective of the scheme was to enhance access to, and ensure high quality secondary school education for all Kenyans. The philosophy behind the scheme was to translate into reality the idea that no child who qualifies for secondary education should be denied access due to inability to pay school fees.

At inception of the scheme, funds were disbursed directly to secondary schools from the Ministry Headquarters, based on the schools student enrolment. Schools were expected to distribute the bursary funds in accordance with guidelines issued by Ministry of Education. The general MOE guidelines directed schools to allocate money to poor students on the basis of academic records and discipline. At the school level the management board with the help of teachers identified needy students to

benefit from those funds. There were however, concerns then that the school authorities were not in a better position of identifying the needy students. There were further allegations that these funds were not being disbursed transparently. In most cases head teachers ultimately decided on who was to receive bursary without making reference to the Board of Governors or the teaching staff (MoE Circular 2005). Prior to 2003, the following criteria were used to allocate bursary funds to schools;

- National schools received 5% of the total National allocation.
- An amount equivalent to 25% of the 95% total National allocation was set aside for ASAL Districts.
- The remaining 75% of the 95% was allocated to all public schools including ASAL districts.

In 2003, the Ministry and other stakeholders decided to modify the scheme in line with government policy on decentralization and to respond to complaints of mismanagement and lack of impact. Instead of sending funds from headquarters direct to schools, the funds go through constituencies (MoE Circulars, 2005). Some of the scheme enhancements included:

- Use of constituency poverty indices to ensure a more comprehensive consideration of poverty in targeting the needy
- Beneficiaries identified by Constituency Bursary Fund Committees that include a broader participation by various education stakeholders in a constituency. This was expected to enhance transparency in the process of identification of needy students.

Table 2.4 gives a breakdown of Ministry of Education allocation of bursary funds per province over a four-year period and indicates a total disbursement of KShs 3.13 billion.

**Table 2.4: Bursary Allocation by Provinces (2003-2007)**

Provinces	Allocations in Kshs (2003/04 to 2006/07)				
	2003/2004	2004/2005	2005/2006	2006/2007	Total
<b>Nairobi</b>	29,269,799	29,046,158	28,826,158	31,717,656	<b>118,859,771</b>
<b>Coast</b>	53,385,493	47,686,882	55,631,413	48,678,942	<b>205,382,730</b>
<b>North Eastern</b>	21,580,802	15,578,592	17,776,416	14,211,896	<b>69,147,706</b>
<b>Eastern</b>	152,690,239	158,376,219	140,117,251	137,692,380	<b>588,876,089</b>
<b>Central</b>	88,165,523	81,009,803	134,806,044	142,806,408	<b>446,787,778</b>
<b>Rift Valley</b>	163,486,159	154,774,112	174,705,821	169,602,560	<b>662,568,652</b>
<b>Western</b>	106,729,109	112,416,260	102,728,973	104,618,636	<b>426,492,978</b>
<b>Nyanza</b>	152,413,566	163,487,327	145,407,924	150,671,392	<b>611,980,209</b>
<b>Total</b>	<b>767,720,690</b>	<b>762,375,968</b>	<b>800,000,000</b>	<b>800,000,000</b>	<b>3,130,096,658</b>

**Source:** Bursary Disbursements (2003/2004 to 2006/2007) (MoE, 2005)

## 2.7 Organization of the Current Bursary Scheme

According to the Ministry of Education circular Ref No G9/1/VIII/101 dated 22<sup>nd</sup> April 2005, the central Government of Kenya is the main source of the bursary funds received in secondary schools. The custodian of the Secondary School Bursary Scheme is the Ministry of Education and its role is to:

- i) Create awareness on the existence of the bursary scheme and intended objectives
- ii) Prepare National Budgetary allocations for bursary funds based on a needs assessment
- iii) Issuance of clear guidelines on the management, disbursement and utilisation of Bursary funds to all stakeholders

- iv) Disburse bursary funds to the various constituencies based on the allocation criteria developed
- v) Monitor the use of funds to ensure expenditure is in line with the guidelines
- vi) Based on this monitoring role, provide recommendations to the Government on the improvements necessary for the scheme to achieve its objectives consistently.

The Constituency Bursary Committee (CBC) is charged with the responsibility of evaluating and awarding bursaries to students at the constituency level in accordance with the guidelines issued by the Ministry of Education. The functions of the CBC as stipulated in the guidelines are-

- To issue and receive bursary application forms (FORM ‘A’)
- To vet and consider bursary applicants using the established criteria (FORM D)
- To verify and ensure that all bursary cheques are dispatched to the schools
- To prepare and submit reports on the Constituency bursary scheme to the Permanent Secretary, Ministry of Education

The Constituency Bursary Committee has a maximum of sixteen members, a third of who should be women. The Committee is made up of:

- The Area Member of Parliament (Patron)
- The Area Education officer (Secretary)
- Three representatives of religious organizations
- Two chairpersons of PTA’s of two secondary schools
- One chairperson of Board of Governors
- One councillor
- District Officer

- One representative of an education based NGO or CBO
- KNUT representative
- Three co-opted members to include, two headteachers, one of whom must be from a girls' secondary school.

The DEO is required to preside over the elections of the CBCs Chairpersons and Treasurers. The Chairperson should be a professional who is well versed in Education matters with a minimum of form four level of education. The Treasurer on the other hand should have knowledge of accounting procedures/Financial management where possible. Both the Chairperson and the Treasurer must be elected from amongst members who do not hold elective political offices. According to the guidelines the CBCs are supposed to serve for a period of 3 years which can be renewed once.

## **2.8 Procedure of Bursary Allocations**

The Ministry of Education has clearly stipulated the criteria to be followed in the allocation of bursaries in secondary schools. According to the guidelines students are required to fill a Form A which capture the student's bio data, economic background of the parents where applicable and some information on the student's performance in school. There is also provision for the area chief or a religious leader to comment on the status of the student's family background. Once these forms are filled, they are submitted to the Area Education Officer who is also the Secretary of the CBC. The AEO is supposed to prepare these forms after which a meeting of the CBC is called. The main agenda of this meeting is to discuss the bursary applications and allocate bursaries strictly in accordance with the guidelines. The CBC is supposed to first award marks to the applicants where various variables are considered. These include family status, affirmative action/special circumstances, discipline and academic

performance. Based on these criteria, students who are total orphans score higher marks while the girl child scores more than boys. Similarly, bright and disciplined students earn high marks than those who may be undisciplined and academically challenged. After this exercise the applicants are ranked and the most needy are awarded bursaries based on the type of school they attend. Students in National schools are awarded a minimum of Kshs 15,000; those in other boarding schools are awarded Kshs 10,000 while students in day schools are awarded a minimum of Kshs 5000. However, in the latest guidelines issued by the PS Ministry of Education, a minimum of Kshs 8,000.00 is to be awarded to a needy secondary school student in a boarding school. The focus has therefore been shifted to needy students in boarding secondary schools (MoE Circular, 2008).

When the list of the beneficiaries is fully agreed on, it is submitted to the DEO together with the minutes of the CBC duly signed by the Chairman, Secretary and the Treasurer. Cheques are then prepared and should be dispatched to the schools within one week of the date of preparation. The DEO is thereafter supposed to make returns within two months after receipt of the funds to the Permanent Secretary Ministry of Education.

## **2.9 Studies on the Impact of the CBF**

Not many studies have been conducted to find out the impact of constituency bursary funds on retention. One of the studies identified was conducted by Kirigo (2008) to assess the effectiveness of bursaries in enhancing retention in secondary schools in Mombasa District. The study established that schools and constituency bursary committee in Mombasa District followed the laid down criteria by the Ministry of Education and that 42% of the deserving students received bursaries, 60% of whom

were female. Kirigo (2008) further established that bursary fund had no significant impact on the retention in Mombasa District, based on the fact that 53.3% of those who received bursaries were sent home over three times due to inadequacy of funds set aside for bursary and unpredictability of the funds.

In another related study, Mwawughanga (2008) set out to assess the impact of Constituency Bursary Fund on girl-child secondary education in Wundanyi Division of Taita District. The study established that the Constituency Bursary Fund did not have a significant impact on girl-child's access and retention in secondary school in Wundanyi Division of Taita District. The main reasons for this were that the bursary fund allocated to individual girls is not adequate to sustain girls in school, and as such most girls were still sent home for fees; poor academic performance of girls disqualifies most of them from accessing the fund; there is lack of information about the bursary fund as evidenced by students who reported that they did not know how to apply for the fund; and the attitude of the community towards education for the girl-child education was negative, as reported by 76.7% of the teachers, and thus girls were not encouraged to take advantage of existing opportunities.

Ngware, Onsomu, Muthaka, and Manda (2006) conducted a study to examine strategies for improving access to secondary education in Kenya. They concluded that persistently low participation rates from low income households indicates that the bursary fund has limited impact in ensuring that the beneficiaries are adequately supported for a full cycle. Consequently, they proposed that the government initiative in decentralizing and reviewing bursary funds management to constituency level should be closely monitored. Clear guidelines should be developed to ensure efficiency and effectiveness in order to increase access to secondary education. Further, they suggest that to address income inequalities in the society, a special

assistance scheme and preferential policies should be developed to target vulnerable groups such as students from marginalized communities, those with special needs, and orphaned and vulnerable children.

Mellen (2004), in a study on the role of government bursary funds in enhancing girl participation in Nyamira District found that the Ministry of Education bursary had not sustained any girl for four years. She too noted that it had failed to meet the gender equity objective and that more boys received slightly higher bursaries than girls.

Mwaura (2006) in his study on government bursary scheme and its role in enhancing secondary school participation of the poor and the vulnerable learners in Thika District found that the CBF was ineffective in that it was inadequate (thinly spread, unpredictable and very few students had been retained by the fund up to Form Three in 2005. He also observed that the awarding criteria were not very clear especially on how to finally arrive at a student to be awarded a bursary in each category. On the other hand, the award criteria released by the government were not followed and it was not fair since it was said not to target the poor. He also noted that the government did not monitor the allocation procedure giving room for inefficiency.

## **2.10 Summary**

This chapter has covered a review of literature related to the impact of bursary funds on needy students' retention in education. The literature review has shown that bursary funds can improve access and retention in secondary schools. The literature gaps have also been identified and which this study seeks to fill. The study by Njeru and Orodho (2003) was conducted when disbursement of funds was under school heads and BOGs while that of Mwaura and Ngware et al (2006) was conducted when the government had not come in with new guidelines which are geared towards

improving the efficiency of the scheme and enable it meet its objectives of increasing access for the poor households to secondary schools, ensure the retention of those who enter secondary schools, enhance completion rates and reduce disparities and inequalities in the provision of secondary education. The studies by Mwawughanga (2009) and Mellen (2004) were conducted to assess the effects of bursary fund on girl-child access to secondary education. These studies did not consider the boy-child. Furthermore, the studies by Mwaura (2006), Mellen (2004), and Ngware, Onsomu, Muthaka, and Manda (2006) were conducted before the government introduced free secondary education, and none of the identified studies was carried out in Embu. To fill these gaps, the study assessed the effectiveness of the Constituency Bursary Funds in enhancing needy students' retention in secondary schools education in Manyatta Constituency of Embu West District.

## **CHAPTER THREE**

### **RESEARCH METHODOLOGY**

#### **3.1 Introduction**

In this chapter details of how the research was conducted are presented. The chapter is divided into seven sections: the research design, target population, sample and sampling technique, research instruments, reliability and validity of instruments, data collection procedures and methods of data analysis.

#### **3.2 Research Design**

The study employed the descriptive survey design. According to Kothari (1985), 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. This design was considered appropriate because it enabled the researcher to collect and analyze data, on present practices of the CBF, from a wide range of respondents on constituency bursary committee members, school principals, students, parents, education officers and government officials. The design enabled the researcher to describe the existing situation in Manyatta constituency of Embu West District as it relates to the effectiveness of the Constituency Bursary funds in enhancing needy students' retention in secondary schools.

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

The study was carried out in Manyatta Constituency, Embu West District in Eastern Province, of Kenya. Singleton (1993) noted that the ideal setting for any study should be easily accessible to the researcher and should be that which permits instant rapport,

with the informants. Wamahiu and Karugu (1995) also point out that sometimes being familiar with the research localé helps in gaining acceptance. Manyatta constituency was chosen because it was easily accessible to the researcher and no similar study to the best knowledge of the researcher has been conducted in the constituency. Manyatta Constituency was studied since it has a population with a large diversity in terms of economic status. It also has (i) Provincial schools; (ii) District schools (iii) Boarding schools and (iv) District Day schools where all the required data could be sourced.

### **3.4 Target Population**

The target population was all the 17 public secondary schools in Manyatta Constituency of Embu West District. Of the 17 schools, 4 are provincial; 5 are district boarding, and 8 are district day schools. The target population included all the 17 public secondary school principals, Constituency Bursary Committee members, students, education officers and government officials (chiefs) from Manyatta Constituency.

### **3.5 Sample and Sampling Techniques**

The respondents for this study were Constituency Bursary Committee members, that is, the secretary and the treasurer, school principals, students, Embu District Education Officer, and area chiefs. Stratified random sampling technique was employed. Kathuri and Pals (1973) define stratified sampling as the procedure of sampling when the population is homogenous in terms of certain required characteristics. According to Mugenda and Mugenda (1999), stratified random sampling subjects are selected in such a way that the existing sub-groups in the population are more or less reproduced in the sample. The researcher selected 10

schools from the 17 public secondary schools in Manyatta Constituency for the study. This formed 58.9% of the population, which is higher than the minimum 20% as recommended by Gay (1992). The reason behind stratified random sampling was to ensure that all school categories were selected and to ensure fair representation. The researcher first stratified the schools according to status of the school, that is, provincial, district boarding and district day. Then, proportionate random sampling was used to select 58.9% sample from each category. Therefore the sample size included 2 provincial schools, 3 district boarding schools, and 5 district day schools, giving a total of 10 schools.

All the principals from the sampled ten schools were automatically involved in the study. In selecting the students, purposive sampling was used. Purposive sampling allowed the researcher to involve those students who had applied for bursaries and those deserving to receive bursaries. To determine the number of students who either had benefited or ought to have benefited from bursaries, the researcher requested principals to avail a list of all students who had applied for and or benefited from bursaries. The principals also assisted the researcher to identify five students who had problems in payment of fees and who therefore deserved bursaries, but who had not benefited from this. Five students per school who had benefited from bursaries but still had fees balances were also interviewed. In cases where there were no such students, another school will be selected until the desired number of student participants is obtained.

Two members of the Manyatta Constituency Bursary Committee (one male and one female), the District Education Officer (DEO) in charge of Embu West District, and two area chiefs were involved in the study.

### **3.6 Research Instruments**

Two types of research instruments, questionnaires and interview schedules, were employed in data collection. Questionnaires were used to gather data from principals and students, while interview schedules were used to collect data from bursary committee members, the DEO and the Chiefs. The questionnaires were used for data collection because, as Kiess and Bloomquist (1985) observe, it offers considerable advantages in the administration: it presents an even stimulus potentially to large numbers of people simultaneously and provides the investigation with an easy accumulation of data. Gay (1992) maintains that questionnaires give respondents freedom to express their views or opinion and to make suggestions. On the other hand, interview schedules enable a researcher to get more information from respondents since it is possible to probe further during face-to-face interviews and seek clarifications, which would not be possible using a questionnaire (Kiess and Bloomquist, 1985). Details about the data collection tools are given below.

#### **3.6.1 Questionnaire for Principals**

This questionnaire was used to collect data from principals on the effectiveness of the constituency bursary fund and its impact retention of students in secondary schools. The questionnaire had three sections. The first section gathered background data of the principals and their schools. The second section of the questionnaire collected data related to effectiveness of the bursary fund and its impact on retention to secondary education, while the third section gathered data on challenges faced in bursary fund allocation and suggested solutions (see Appendix II).

### **3.6.2 Questionnaire for Students**

This questionnaire contains three sections. The first section collected background information of the students. The second section of the questionnaire contains items to measure the financial situation of the students' parents/guardians. The third section had items to collect data related to bursary fund allocations (see Appendix III).

### **3.6.3 Interview Schedule**

The study had three interview schedules, one each for bursary committee members, the DEO, and the Chief. They were used to guide interviews to be held on the effectiveness of the Constituency Bursary Funds in enhancing retention of needy students' in secondary education (see Appendix III - VI).

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

### **3.7.1 Reliability**

Mugenda and Mugenda (1999) define reliability as a measure of the degree to which a research instrument yields consistent results or data after repeated trial. To enhance reliability of the instruments, a pilot study was conducted in two schools similar to those targeted for the study, but which was not used in the final study. The reason behind pre-testing is to improve reliability of the instruments. Within each school, 10 students, 2 parents and the principal were required to fill the questionnaire. The aim of the pilot study was to enhance the reliability of the research instruments and allow the researcher to gain familiarity with the instruments. Split-Half technique for reliability test (Gay, 1992) was employed, using Spearman Brown Prophecy technique. A value of at least 0.75 was considered adequate to declare the instruments reliable. The researcher also assessed the clarity of the questionnaire items so that those items

found to be inadequate or vague were either discarded or modified to improve the quality of the research instrument.

### **3.7.2 Validity**

Validity is defined as the accuracy and meaningfulness of inferences, which are based on the research results (Mugenda and Mugenda, 1999). In other words, validity is the degree to which results obtained from the analysis of the data actually represents the phenomena under study. Validity according to Borg and Gall (1989) is the degree to which a test measures what it purports to measure. According to Borg and Gall (1989), validity of an instrument is improved through expert judgment. As such, the researcher sought assistance of research experts, lecturers and experienced supervisors in order to help improve validity of the instrument.

## **3.8 Data Collection Procedure**

The researcher got an introduction letter from Kenyatta University and a research permit from the Ministry of Science and Technology. After this, the researcher booked an appointment with the sampled schools through the Principals to visit and administer the questionnaires. The researcher then visited each of the schools and administered the questionnaires herself. The respondents were given instructions and assured of confidentiality after which they were given enough time to fill in the questionnaires, after which the researcher collected the filled-in questionnaires on the same day. The researcher booked an appointment with the constituency bursary committee members, chiefs, and the DEO on dates when interviews were held.

### **3.9 Data Analysis Plan**

Data collected from the field was coded and entered into the computer for analysis using the Statistical Package for Social Sciences (SPSS). As Martin and Acuna (2002) observe, SPSS is able to handle large amount of data, and given its wide spectrum of statistical procedures purposefully designed for social sciences, it is quite efficient. Data collected was both qualitative and quantitative in nature. Qualitative data was analyzed by arranging responses according to the research questions and objectives. Descriptive statistics including percentages and frequency counts was used to analyze the quantitative data obtained. Bell (1993) maintains that when making the results known to a variety of readers, simple descriptive statistics such as percentages have a considerable advantage over more complex statistics. Borg and Gall (1989) also hold that the most widely used and understood standard proportion is the percentage. The results of data analysis were presented in frequency tables, histograms and pie charts. Thereafter, conclusions and recommendations were drawn from the findings.

## **CHAPTER FOUR**

### **DATA ANALYSIS, PRESENTATION OF FINDINGS AND DISCUSSION**

#### **4.1 Introduction**

This chapter presents data analysis and discussion of the study findings. The general objective of the study was to assess the effectiveness of the Constituency Bursary Fund in enhancing needy students' retention in secondary schools. The findings of the research are presented based on the five research questions restated below:

1. To what extent is the criteria given by the Ministry of Education on bursary allocation adhered to in Manyatta Constituency of Embu District?
2. What systems of internal checks and audit are employed to ensure compliance with CBF allocation procedures?
3. To what extent has the Constituency Bursary Fund contributed to the retention of students in secondary schools?
4. What constraints are faced in bursary fund disbursements?
5. What improvements can be adopted to create efficiency of the bursary scheme?

The background data of the respondents is given first, followed by the analysis and discussion of each of the four research questions.

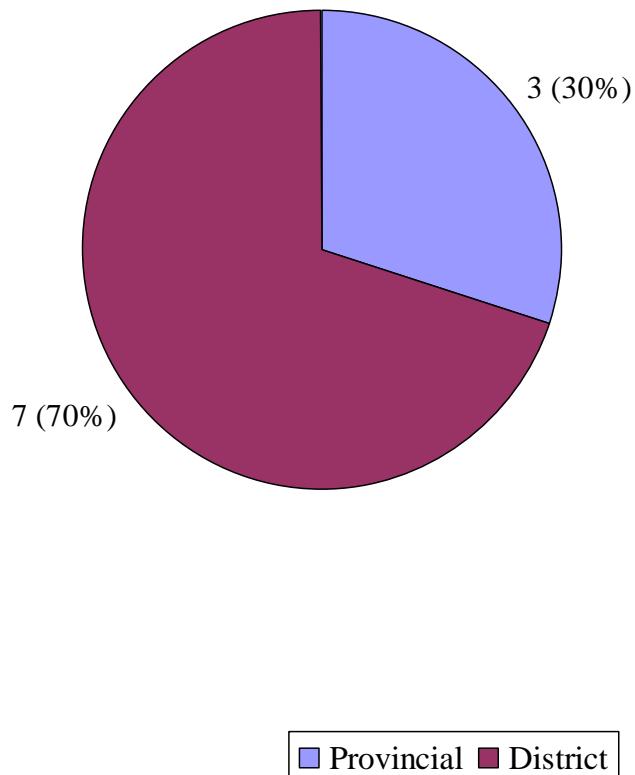
#### **4.2 Background data of the respondents**

The participants comprised of 10 school principals and 100 students from Manyatta Constituency. Out of the 10 principals, 6 (60%) were male while 4 (40%) were females. As for the students, 58 (58%) were male while 42 (42%) were female. Table 4.1 shows the distribution of students by class.

**Table 4.1: Distribution of Student Respondents by Class**

	<b>Frequency</b>	<b>Percent</b>
Form 2	32	32.0
Form 3	28	28.0
Form 4	40	40.0
<b>Total</b>	<b>100</b>	<b>100.0</b>

The table shows that 32 (32.0%) of the students indicated that they were in form two, 28 (28.0%) were in form three while 40 (40.0%) indicated they in form four. This shows that the majority of the students who took part on the study were form fours, who have stayed in the schools for the longest time and therefore are expected to know everything that goes on in the schools. Figure 4.1 shows the school categories.

**Figure 4.1: School categories**

The figure shows that 7 (70.0%) of the sampled schools were district while 3 (30.0%) were provincial.

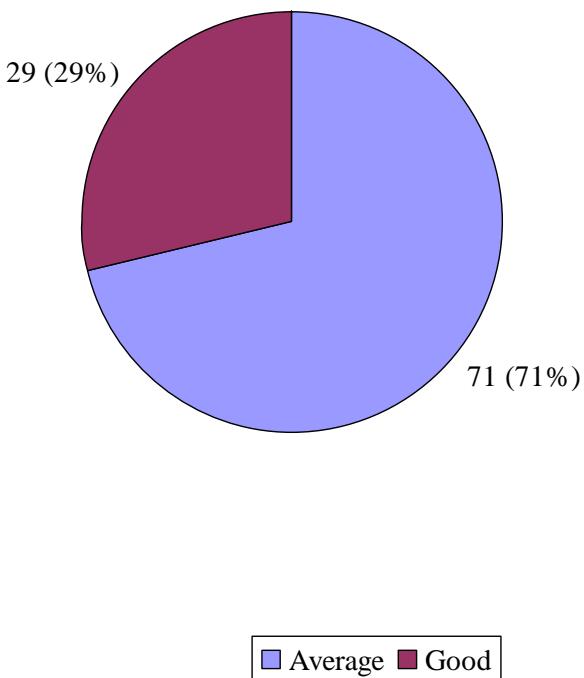
Table 4.2 shows students' responses concerning their guardians.

**Table 4.2: Person(s) living with students**

	<b>Frequency</b>	<b>Percent</b>
Both parents	29	29.0
One parent	46	46.0
Guardian	25	25.0
<b>Total</b>	<b>100</b>	<b>100.0</b>

The table shows that 29 (29.9%) of the students indicated that they lived with both parents, 46 (46%) indicated one parent while 25 (25.0%) indicated they lived with their guardians. Most of the students came from single parent families, who may not have been able to school them sufficiently because of lack of enough funds to cater for both basic needs and school fees.

Figure 4.2 shows the students' performance for the past term.



**Figure 4.2: Student performance**

The figure shows that majority, 71 (71.0%), of the students' performance in the internal exams was average while 29 (29.0) had a good performance. Upon being asked whether they liked school, 97.0% of the students indicated that they liked school very much while 3% indicated that they liked school on an average level. Table 4.3 shows the students' socio-economic backgrounds.

**Table 4.3: Students' socio-economic background**

	Frequency	Percent
Businessman	50	50.0
Farmer	31	31.0
Retired	3	3.0
No work	16	16.0
Total	100	100.0

Table 4.1 shows that 50% of the students' guardians were businessmen, 31% were farmers, 3% were retired while 16% had no reliable source of income. This implies

that most of the students came from backgrounds where they were expected to be well provided for, since most of the guardians worked.

#### **4.3 Extent to which the Criteria given by The Ministry of Education on Bursary Allocation is adhered to**

The Secondary Schools Bursary Scheme was introduced in the 1993/1994 financial year with the objective of cushioning the poor households from the impact of poverty, inflation and the effects of HIV/AIDS (MoE, 2003). At inception of the scheme, funds were disbursed directly to secondary schools from the Ministry Headquarters, based on the schools student enrolment. Schools were expected to distribute the bursary funds in accordance with guidelines issued by Ministry of Education. The general MOE guidelines directed schools to allocate money to poor students on the basis of academic records and discipline. At the school level the management board with the help of teachers identified needy students to benefit from those funds. According to the guidelines students were required to fill a Form A which captured the student's bio data, economic background of the parents where applicable and some information on the student's performance in school.

The chiefs were asked to give the procedure employed in disbursement of bursary in the constituency. Their responses are given below:

- Parents/guardians pick bursary forms from schools/photocopying outlets/constituency office
- Forms are filled by parent/student/chief or assistant chief or church minister and primary and secondary headteachers.
- Forms are returned to the CBC which uses the information on the forms to identify the cases and allocate them funds. Recently a sub-location committee was interviewing applicants to determine their levels of need.

- Cheques are then sent to the beneficiaries through their schools

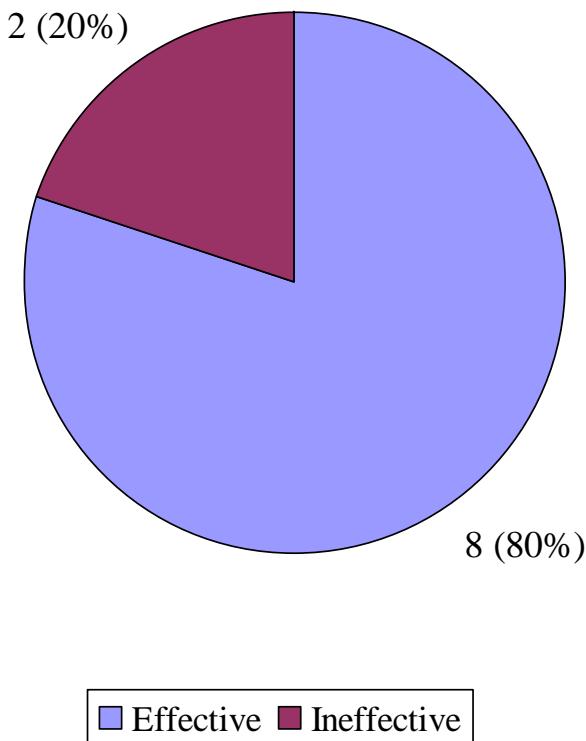
Table 4.4 shows the procedures employed in bursary disbursement in schools.

**Table 4.4: Bursary disbursement procedures**

Procedures	Frequency	Percent
School provide forms for students to fill every term and apply for the bursary	7	70.0
Headteachers decide the students to benefit	8	80.0
Teachers and headteachers review school records and pick worthy students	6	60.0
The board of governors decide who to benefit	5	50.0
Students with huge fee balances are considered	7	70.0

The table shows that majority, 80% of the principals indicated that they decided which students benefited from the bursaries, 70% indicated that students with huge fee balances were considered, 70.0% indicated that the students apply for the bursaries and the rest replied as shown in the table. In confirmation to these findings, a previous study showed that in most cases head teachers ultimately decided on who was to receive bursary without making reference to the Board of Governors or the teaching staff (MoE Circular 2005).

Figure 4.3 shows principals' views on the effectiveness of the bursary procedures.



**Figure 4.3: Principals' views on Effectiveness of the procedure**

The figure shows that 8 (80%) of the principals indicated that the procedures employed on bursary disbursement in their schools were effective since they were able to capture student bio data ,economic background of the parent ,student performance and family background status as stipulated in the CDF policy guidelines.

Table 4.5 shows students' views regarding who should apply for the bursary funds.

**Table 4.5: Students views on who should apply for Bursary funds**

	Frequency	Percent
All students	7	7.0
Disabled students	4	4.0
Orphans	8	8.0
Needy students who cannot afford school fees	81	81.0
<b>Total</b>	<b>100</b>	<b>100.0</b>

The table shows that more than 81 (81.0%) of the students indicated that the persons who should apply for the bursary fund ought to be needy students who cannot afford school fees. The rest responded as shown in the table. All the students also indicated that they considered themselves as deserving to have received bursary funds. The chiefs and the DEO also indicated that all students were eligible for the bursary fund which was not possible because the fund was meant to aid bright and needy students from poor backgrounds.

Table 4.6 shows the number of times students applied for the bursary and the times they got it after applying.

**Table 4.6: Number of times Students Applied and receiving bursary funds**

	No of times applied			No of times received		
	F	%	*C%	F	%	C%
Once	20	20.0	20.0	56	56.0	56.0
Twice	22	22.0	42.0	23	23.0	79.0
Thrice	32	32.0	74.0	18	18.0	97.0
Four times	26	26.0	100.0	3	3.0	100.0
Total	100	100.0		100	100.0	

\*C% =cumulative percent

The table shows that 32.0% of the students had applied for the bursary thrice, 26.0% had applied four times, 22.0% applied twice while 20.0% applied once. 56.0% of the students who applied for the bursary received funds only once, 23% received twice and the rest replied as shown in the table This is an implication that the constituency bursary fund considers new applicants to ensure that the fund does not always aid the same students.

All the students however indicated that the money they received was not enough to cater for their education needs for the whole year and that they still had fee balances after getting the bursary fund.

This finding seems to concur with Ngware, Onsomu, Muthaka, and Manda (2006) who conducted a study to examine strategies for improving access to secondary education in Kenya. They concluded that persistently low participation rates from low income households indicates that the bursary fund had limited impact in ensuring that the beneficiaries are adequately supported for a full cycle.

Table 4.7 shows how the fee deficit that the students had was paid.

**Table 4.7: Payment of fee deficit**

	Frequency	Percent
Never paid	54	54.0
parent/Guardian paid	22	22.0
Well-wisher paid	24	24.0
<b>Total</b>	<b>100</b>	<b>100.0</b>

The table shows that half the students 54 (54.0%) indicated that the fee deficit they had was never paid, 22% indicated that their parents/guardians paid while the other 24% indicated that a well wisher paid their fee deficit after receiving the bursary. This implies that the students who need bursary funds still suffer even after receiving the funds because the funds do not cover their needs and most of them still have outstanding fee balances. This may have a negative effect on their education.

Mwaura (2006) in his study on government bursary scheme and its role in enhancing secondary school participation of the poor and the vulnerable learners in Thika District found that the CBF was ineffective in that it was inadequate, thinly spread, unpredictable and very few students had been retained by the fund up to Form Three in 2005. This is in agreement with the findings of the study, which established that

students who needed bursary funds hardly accessed them resulting to a retention rate of between 25-49% in Manyatta constituency.

#### **4.4 Systems of Internal Checks and Audit Employed to Ensure Adherence with CBF Allocation Procedures**

The allocation of CBF in Kenya has presented a myriad of challenges, among them being ensuring that the CBF allocation procedures are adhered to.

The DEO was asked if there were any systems of internal checks and balances to ensure compliance with allocation procedures. His responses were:

- There were no clear ways of monitoring the bursary allocation system since the bursary was awarded upon application and the main factors considered were total orphanage, partial orphanage, single parentage and performance. There was no clear information on the criteria to identify the real needy cases since there are some orphans who have able guardians hence not needy.
- The committee rate the needs of the students according to the information given on the application forms and in accordance with the MoE, but there is no system to check if accurate information was given leading to recommendation to award bursaries to undeserving students.
- There was no regular monitoring in schools to verify whether the poor and vulnerable students of both sexes who benefit from the bursary are retained in schools throughout and whether they pass exams.

#### **4.5 Effects of Constituency Bursary Fund to the Retention of Students in Secondary Schools**

The main aim of the CBF was to ensure that students who qualify for secondary education get a chance to join the schools they chose, and not lose out on education

because of school fees. There are many students who apply for bursaries yet they fail to benefit from them. Six (60.0%) of the principals indicated that 75% of the students who applied for the bursary failed to benefit from it while 4 (40.0%) indicated that 50% of the students who applied benefited from the bursary. They cited some of the reasons as to why students failed to benefit from the bursaries as being:

- Some students do not attach relevant documents, so their cases cannot be verified and they miss out on the bursaries
- The funds are inadequate compared to the large number of needy cases
- Criteria used to allocate funds is not laid down in some schools, so some needy students may not benefit from the bursaries
- Upon careful investigation, some students who apply for the bursaries are found to be frauds who do not need it, so their cases do not benefit from the bursaries

Table 4.8 shows principals' ratings of the impact of the constituency bursary scheme on secondary education retention.

**Table 4.8: Principals' rating on the impact of Bursary scheme on retention**

	<b>Frequency</b>	<b>Percent</b>
Has raised retention by 25% - 49%	5	50.0
Has raised retention by below 25%	5	50.0
<b>Total</b>	<b>10</b>	<b>100.0</b>

The table shows that 5 (50.0%) of the principals indicated that the bursary scheme had raised retention by 25% - 49% while another 5 (50.0%) indicated below 25%. This implies that the bursary scheme slightly improved secondary school retention rates, which shows that the funds may not be enough to help the students as needed.

The students were asked their opinions regarding the benefits of Constituency Bursary Fund in relation to retention of students in secondary schools. There indicated an overall positive impact of the scheme. Their responses are shown below.

- Bursary funds assists very much in that it helps needy children or orphans pay up some of their school fees which would have made them lose quality time out of class at home however they indicated that the amount awarded was not enough to clear their school fees.
- In extreme cases, bursary funds helped the needy students to acquire personal effects like toiletries, which are necessary for their survival in school. They however indicated that there other basic needs like food and clothing that were not catered for.

This was in agreement with a study by Oyaro, (2008) which established that despite the efforts by the government to improve access and retention of students in secondary schools, evidence shows that access to secondary education is still highly skewed in favour of the rich. Okoth (2009) also shows that thousands of poor students in the country do not benefit from CBF leading to dropout. Okoth argues that there are loopholes in the allocation of bursaries.

#### **4.6 Constraints Faced in Bursary Funds Disbursement**

The study established that there are many problems experienced in the disbursement of funds, one of them being equal distribution of the funds. It has been widely known that boys have fewer needs than girls, yet girls always get fewer funds than boys, which makes it impossible for them to achieve their goals through education. This view is supported by Mellen (2004), in a study on the role of government bursary funds in enhancing girl participation in Nyamira District found that the Ministry of Education bursary had not sustained any girl for four years. She too noted that it had

failed to meet the gender equity objective and that more boys received slightly higher bursaries than girls.

Table 4.9 shows the school level challenges encountered at the school level in relation to bursary allocations in Manyatta Constituency.

**Table 4.9: School level challenges as stated by principals**

	Frequency	Percent
Lack of transparency	8	80.0
In genuine cases apply and benefit instead of the needy	5	50.0
Lack of clear bursary disbursement procedures	7	70.0
Inadequate funds to meet demand of needy students	9	90.0
Sycophancy	4	40.0
Lack of support from the school board in disbursement	5	50.0

The table shows that 90.0% of the principals indicated that the biggest challenge they encountered was inadequate funds to meet the needs of the students, which lowered the retention rates. Eighty percent indicated that there was lack of transparency in disbursement of funds which resulted to corruption and favourism, 70.0% indicated that they lacked clear bursary disbursement procedures and the rest responded as shown in the table. The chiefs and DEO also indicated that the funds were not enough.

Mwaura (2006) observed that the awarding criteria were not very clear especially on how to finally arrive at a student to be awarded a bursary in each category. On the other hand, the award criteria released by the government were not followed and it was not fair since it was said not to target the poor. He also noted that the government did not monitor the allocation procedure giving room for inefficiency.

Table 4.10 shows the challenges faced by the constituency bursary committee in relation to bursary allocations.

**Table 4.10: Constituency bursary committee level challenges**

	<b>Frequency</b>	<b>Percent</b>
Lack of precision	8	80.0
The process is slow and cumbersome	9	90.0
Limited funds and the population of students to be considered is large	7	70.0
No clear guidelines on identifying needy cases	5	50.0
Centralization of bursary funds	8	80.0
Corruption	9	90.0

Table 4.9 shows that 90.0% of the principals indicated that the biggest challenges faced at the constituency level were corruption and that the process was slow and cumbersome.

In addition, 80% indicated that there was lack of precision while the same percentage indicated that there was centralization of bursary funds. The rest responded as shown in the table.

This was in agreement with a study on the Secondary School Bursary Scheme by Njeru and Orodho (2003) which identified major weaknesses of the secondary school bursary scheme as lack of transparency, inadequacy of funds, fluctuations of the amount allocated, disbursement delays; lack of uniform criteria for identification of the poor students and inadequate equity consideration.

#### **4.7 Improvements necessary to Create Efficiency of the Bursary Scheme**

The bursary scheme has been known to involve a lot of people, and where people abound there is bound to be discrepancies. However, these discrepancies can be dealt with effectively by improving the way bursaries are disbursed. The Kenyan

government has tried to improve the allotment of bursaries, but there are still some areas that need more improvements. From the financial year 2003/2004, the bursary funds disbursements methods were changed and funds are now disbursed directly to the 210 constituencies at District Level. Each Constituency gets an initial Kshs one million and the remaining amount is disbursed on the basis of Constituency students' enrolment and District Poverty Index. The funds are then disbursed to the selected students in secondary schools (Republic of Kenya 2004).

Table 4.11 shows principals' and students' views on the improvements that can be adapted to create efficiency of the bursary scheme.

**Table 4.11: Improvements recommended by principals and students on bursary scheme efficiency**

<b>Improvements</b>	<b>Students</b>		<b>Principals</b>	
	<b>F</b>	<b>%</b>	<b>F</b>	<b>%</b>
The process should be made faster	66	66.0	6	60.0
Fair distribution of funds	80	80.0	9	90.0
Bursary should be allocated according to need	79	79.0	7	70.0
Forms should be readily available	52	52.0	6	60.0
Adequate funds should be allocated to students	75	75.0	8	80.0
The category of distribution should be clearly stipulated	61	61.0	6	60.0
Funds should be sent directly to schools	43	43.0	5	50.0
Transparency in distribution should be practiced	74	74.0	8	80.0

The table shows that 80 (80.0%) of the students and 90% of the principals indicated that there should be fair distribution of funds since some leaders recommended undeserving cases in that, schools with more needy students should be given more funds than those with less needy students, 79% of the students and 70% of the

principals indicated that bursaries should be allocated according to need, 75.0% of the students and 80% of the principals indicated that adequate funds should be allocated to schools while 74% of the students and 80% of the principals indicated that there should be transparency in distribution of funds. The rest responded as shown in the table. If these recommendations were adopted at Manyatta Constituency, the bursary fund would adequately support needy students in schools and retain them for the full secondary school cycle.

## **CHAPTER FIVE**

### **SUMMARY, CONCLUSION AND RECOMMENDATIONS**

#### **5.1: Introduction**

This chapter presents the summary of the study, conclusions and recommendations arrived at. It also gives suggestions for further studies.

#### **5.2: Summary**

The purpose of this study was to assess the effectiveness of the Constituency Bursary Fund in enhancing needy students' retention in secondary schools education. The participants comprised of 10 school principals and 100 students from Manyatta Constituency. Given below is a summary of the main study findings.

The study found out that 80.0% of the principals indicated that they decide the students to benefit from the bursaries, 70.0% indicated that students with huge fee balances were considered, 70.0% indicated that the students apply for the bursaries. Eight (80.0%) of the principals indicated that the procedures employed on bursary disbursement in their schools were effective while 2 (20.0%) indicated that the ones used in their schools were ineffective. The students were asked if they had heard about the constituency bursary fund. Ninety three (93.0%) indicated that they had while 7 (7.0%) indicated that they had not. This implies that the students were well informed on the existence of bursary funds, and 70.0% of them indicated that they heard about the bursary from their headteachers.

Fifty percent of the students indicated that the persons who should apply for the bursary fund are needy students who cannot afford school fees. It was established that 33.0% of the students had applied for the bursary thrice, 27.0% had applied four times, 22.0% applied twice while 18.0% applied once. 56.0% of the students who applied for the bursary received funds only once, 23% received twice and the rest

replied as shown in the table. All the students however indicated that the money they received was not enough to cater for their education needs for the whole year and that they still had fee balances after getting the bursary fund. Half the students 54 (54.0%) indicated that the fee deficit they had was never paid, 22% indicated that their parents/guardians paid while the other 24% indicated that a well wisher paid their fee deficit after receiving the bursary.

The study found out that 5 (50.0%) of the principals indicated that the bursary scheme had raised retention by 25% - 49% while 5 (50.0%) indicated below 25%. The principals gave the reasons as to why students failed to benefit from the bursary scheme as being: Some students do not attach relevant documents, so their cases cannot be verified and they miss out on the bursaries, the funds are inadequate compared to the large number of needy cases, the criteria used to allocate funds is not laid down in some schools, so some needy students may not benefit from the bursaries and that upon careful investigation, some students who apply for the bursaries are found to be frauds who do not need it, so their cases do not benefit from the bursaries.

Regarding the constraints faced in bursary disbursements, the study established that 90.0% of the principals indicated that the biggest challenge they encountered was inadequate funds to meet the needs of the students, 80.0% indicated that there was lack of transparency, 70.0% indicated that they lacked clear bursary disbursement procedures

Ninety percent said that the process was slow and cumbersome. The principals indicated that the biggest challenge faced at the constituency level was corruption, while 88. % indicated that the process was slow and cumbersome with students no

knowing the amount to expect and when to receive it. 80.0% indicated that there was lack of transparency while the same percentage indicated that there was centralization of bursary funds.

The study found that 80 (73%) of the respondents indicated that there should be fair distribution of funds, 72% indicated that bursaries should be allocated according to need, 75.0% indicated that adequate funds should be allocated to schools while 74.0% indicated that there should be transparency in distribution of funds.

**In order to improve efficiency the proposals put forward by principals and students interviewed included:**

### **5.3: Conclusion**

Based on the findings of the study, it can be concluded that the criteria given by the Ministry of Education was adhered to with 80% of the principals reporting that the procedures were effective, despite the fact that not all students who applied for bursary fund benefited. This is mostly because the funds allocated to schools were not enough to meet the needs of all the deserving students.

The study also established that bursary scheme slightly improved secondary school retention rates by 25%-49% in Manyatta constituency, which means that there may be other factors affecting retention rates other than the availability of funds.

The study further revealed that the most common challenges faced in the distribution of bursary funds were lack of transparency, lack of clear procedures, corruption and that the process was slow and cumbersome since students did not know the amount to expect and when they would receive it. It was however suggested that some improvement could be made to make CBF more efficient. 80% of the students and

90% of the principals suggested that there should be fair distribution of funds while 79% of students and 70% of principals suggested that the fund should be allocated according to needs. 74% of student and 80% of principals suggested that there should be transparency in distribution of funds.

#### **5.4: Recommendations**

1. The distribution of funds should put into consideration that girls tend to have more needs than boys hence a higher proportion should be awarded to them.
2. The constituency bursary fund allocation process has been known to be slow and cumbersome, so the government should ensure close monitoring of the bursary disbursement to improve on accountability, efficiency and effectiveness.
3. Instead of the government sending the funds to constituent heads who then proceed to distribute the funds to schools, the funds should be sent directly to the schools so that school heads distribute the funds to students to avoid delays and nepotism.
4. There should be greater involvement of headteachers and students in the disbursement process by appointing their representatives in the constituency bursary disbursement committee
5. The government should identify categories of poor students' right from primary schools as some do not enroll in secondary schools.

### **5.5: Areas for Further Research**

1. There is need for a study on other bursary programmes besides the Ministry of Education programme meant to assist students from needy families to access education.
2. There is also need for a study on effects of availability of bursary funds on secondary school enrolment rates.

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## **APPENDICES**

### **APPENDIX I**

#### **QUESTIONNAIRE FOR PRINCIPALS**

This research is meant for academic purpose. It will try to find out the effectiveness of the Constituency Bursary Funds in enhancing retention of needy students to secondary education. You are kindly requested to provide answers to these questions as honestly and precisely as possible. Responses to these questions will be treated as confidential. Please do not write your name or that of your school anywhere on this questionnaire. Please tick [√] where appropriate or fill in the required information on the spaces provided.

#### **Section 1: Background Data**

1. Your gender                    Male [ ]      Female [ ]
4. Type of school
- |                       |     |           |     |
|-----------------------|-----|-----------|-----|
| Boys Boarding         | [ ] | Boys Day  | [ ] |
| Girls Boarding        | [ ] | Girls Day | [ ] |
| Mixed Boarding        | [ ] | Mixed Day | [ ] |
| Mixed Day & Boarding  | [ ] |           |     |
| Other (Specify) ..... |     |           |     |
5. Category of the school                    Provincial [ ]      District [ ]

#### **Section 2: Assessment of Effectiveness of the Constituency Bursary Fund**

1. What procedures are employed in bursary disbursement in your school?
2. What is your rating of the effectiveness of these procedures?

[ ] Very Effective                    [ ] Effective

[ ] Ineffective                    [ ] Very Ineffective

Briefly explain your rating

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.....  
.....  
.....

3. How do you determine the students who are to apply for bursary?

.....  
.....  
.....

4. How timely is bursary money released to schools? Ask how timely?

.....  
.....  
.....

5. How do you communicate information about bursaries to students and parents?

.....  
.....  
.....

6. What is your rating of the effectiveness of these communication channels?

[ ] Very Effective [ ] Effective

[ ] Ineffective [ ] Very Ineffective

7. What is your assessment of the level of awareness about the bursary fund in Manyatta Constituency?

[ ] Very High [ ] High

[ ] Low [ ] Very Low

8. Would you say that all needy students/parents are aware of the existence of bursary schemes and the procedures for applying for the funds?

[ ] Yes [ ] No

Please explain your answer.

.....  
.....  
.....  
.....

9. What proportion of eligible students applying for bursaries benefited from the bursary scheme for the last three years (2007 – 2009)?

[ ] 100% [ ] 75% [ ] 50% [ ] 25% [ ] Below 25%

10. To what extent are the funds provided under bursary schemes adequate in meeting the needs of the students' tuition and sustenance?

[ ] Very Adequate [ ] Adequate  
[ ] Inadequate [ ] Very Inadequate

11. What proportion of students applying for bursaries in your school fail to benefit from the bursary scheme for the period 2007 - 2009, and for what reasons?

[ ] 100% [ ] 75% [ ] 50% [ ] 25% [ ] Below 25%

Reasons

.....  
.....  
.....  
.....

12. Who among boys and girls benefit from the bursary scheme for the period 2007 - 2009?

[ ] More Boys benefit than girls  
[ ] More girls benefit than boys  
[ ] Same for both boys and girls

Explain the reasons for the observed trend.

.....  
.....  
.....  
.....

13. What is your rating of the impact of the constituency bursary scheme on secondary education retention in Manyatta Constituency?

[ ] Has raised retention by over 75%  
[ ] Has raised retention by 50% - 75%  
[ ] Has raised retention by 25% - 49%  
[ ] Has raised retention by below 25%

[ ] Has not had any impact on retention

14. Briefly explain your answer to the above question

.....  
.....  
.....

### **Section 3: Challenges Facing the Bursary Scheme**

15. What problems are encountered at the school level and the constituency bursary committee level in relation to bursary allocations?

School Level Challenges

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Constituency Bursary Committee Level Challenges

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16. In what ways can the bursary allocation systems be strengthened to improve retention in secondary schools?

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## **APPENDIX II**

### **QUESTIONNAIRE FOR STUDENTS**

This questionnaire is designed to gather information about bursary fund for public secondary school students. Kindly respond by filling in the spaces provided or ticking the appropriate responses to the questions or information needed. All your responses and information in questionnaire will be confidential and will be used by researchers for the purpose of this study only. So do not write your name or the name of your school anywhere in this questionnaire.

#### **Section 1: Background Information**

Tick the appropriate response as it applies to you.

1. Indicate your gender                     Male                     Female
2. Indicate your Class  
 Form 1                     Form 2  
 Form 3                     Form 4
3. Whom do you live with?  
 Both Parents                     One Parent  
 Guardian  
Others (**Specify**).....
4. Occupation of your parents or Guardians

<b>Father</b>	<b>Mother</b>
<input type="checkbox"/> Businessman	<input type="checkbox"/> Business lady
<input type="checkbox"/> Employed	<input type="checkbox"/> Employed
<input type="checkbox"/> Farmer	<input type="checkbox"/> Farmer
<input type="checkbox"/> Retired	<input type="checkbox"/> Retired
<input type="checkbox"/> No work	<input type="checkbox"/> No work
Other (specify).....	Other (specify).....

5. Indicate your performance last term  
 Good                     Average                     Poor
6. How do you like schooling  
 Very Much                     Average                     Not at All

## **Section 2: Students' Background Information**

7. Have you ever been sent home for lack of school fees? [ ] Yes [ ] No  
8. If yes, how many times have you been sent home for fees since you joined secondary school?

[ ] Once [ ] Twice  
[ ] Thrice [ ] Over three times

9. When you are sent home for fees, approximately how long do you take before going back to school?

[ ] 1 – 3 days [ ] 3 – 5 bays  
[ ] 1 – 2 weeks [ ] 3 weeks – 1 month [ ] Over one month

10. Are your parents/guardians able to buy you all school requirements e.g. textbooks, school uniform, stationery etc? [ ] Yes [ ] No

11. If no in 10) above, please list the items that you lack.

.....  
.....  
.....

12. To what extent do lack of the items listed in 11) above affect your learning?

[ ] To a very great extent [ ] To a great extent  
[ ] To a small extent [ ] To a very small extent  
[ ] Do not affect at all

## **Section 3: Constituency Bursary Fund**

13. Have you ever heard of the constituency bursary fund? [ ] Yes [ ] No  
14. If yes, from whom did you hear about the bursary fund?

[ ] Headteacher [ ] Teachers  
[ ] Parent/Guardian [ ] Community/Church leader  
Others (Specify).....

15. Who do you think should apply for bursary fund? (Tick all that apply)

[ ] All students [ ] Orphans  
[ ] Bright students [ ] Needy students who cannot afford fees

Disabled students

Others (specify).....

16. Do you consider yourself as deserving to have received bursary funds?

Yes       No

Please give reasons for your answer

.....  
.....  
.....

17. How many times have you applied for bursary?

Once       Twice

Thrice       Four times

18. If yes, how many times have you received bursary funds so far?

Once       Twice

Thrice       Four times

19. If you have received bursary funds, indicate the amount received each time.

1<sup>st</sup> time Kshs ..... 2<sup>nd</sup> time Kshs .....

3<sup>rd</sup> time Kshs ..... 4<sup>th</sup> time Kshs .....

20. Was the bursary money received enough to cater for all your educational needs for

the whole year (to pay fees, buy textbooks, etc)?       Yes       No

21. What was the deficit?      KShs.....

22. Did you have a fees balance after getting the bursary fund?       Yes       No

23. If yes, how did you pay the balance?

Never paid       Parent/guardian paid       Well-wisher paid

#### **Section 4: General Opinions on Bursary Scheme**

1. What are your opinions on the benefits of bursary fund in relation to retention

of students in secondary schools?

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2. What problems do students face in relation to accessing bursary funds?

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3. In what ways can the bursary allocation systems be strengthened to improve retention in secondary schools?

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### **APPENDIX III**

#### **INTERVIEW SCHEDULE FOR CONSTITUENCY BURSARY COMMITTEE**

1. What procedures are employed in bursary disbursement in your constituency?
2. How do you determine the students who are to apply for bursary?
3. When is bursary money released to schools?
4. How are the constituency bursary committee meetings organized and how often do you meet?
5. What monitoring and evaluation mechanisms does the committee have to ensure that funds are used for intended purposes only?
6. How do you communicate information about bursaries to students and parents?
7. Would you say that all needy students/parents are aware of the existence of bursary schemes and how they operate? Please explain your answer.
8. What proportion of students applying for bursaries benefit from bursary fund?
9. To what extent are the funds provided under bursary schemes adequate in meeting the needs of the students' tuition and sustenance?
10. What percentage of boys and girls applying for bursaries benefit and what percentage fails to benefit from the bursary scheme, and for what reasons?
11. How do the students benefiting from the bursary scheme and those failing to benefit compare by gender and income groupings?
12. How has the bursary scheme enhanced retention in secondary schools Manyatta Constituency?
13. What problems are encountered at the school level, constituency bursary committee level, and district level in relation to bursary allocations?
14. In what ways can the bursary allocation systems be strengthened?

**APPENDIX IV**

**INTERVIEW SCHEDULE FOR THE AEO/DEO**

- a) What modalities are used by the Constituency Bursary Committees to create awareness of its operational activities?
- b) How do you participate in the Constituency bursary fund disbursement?
- c) What are the criteria used to award bursaries to needy students?
- d) Are there systems of internal checks and balances to ensure compliance?
- e) What is the impact of Constituency bursary fund on retention in secondary schools in Manyatta Constituency of Embu District?
- f) What constraints are faced in bursary fund disbursements?
- g) What are your views on the effectiveness of the Constituency Bursary Scheme?
- h) How can the Bursary Scheme be improved to ensure that all students enrolling in secondary schools complete school?

**APPENDIX V**

**INTERVIEW SCHEDULE FOR CHIEFS**

- a) What modalities are used by the Constituency Bursary Committees to create awareness of its operational activities?
- b) How do you participate in the Constituency bursary fund disbursement?
- c) What are the criteria used to award bursaries to needy students?
- d) Are there systems of internal checks and balances to ensure compliance?
- e) What is the impact of Constituency bursary fund on access to secondary schools in Manyatta Constituency of Embu District?
- f) What constraints are faced in bursary fund disbursements?
- g) What are your views on the effectiveness of the Constituency Bursary Scheme?
- h) How can the Bursary Scheme be improved to ensure efficiency?