EFFECTIVENESS OF THE BURSARY FUND IN ENHANCING EQUITY IN SECONDARY EDUCATION: A STUDY OF SECONDARY EDUCATION BURSARY FUND (SEBF) IN KITUI COUNTY, KENYA

BY

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E55/12798/2009

A RESEARCH PROJECT SUBMITTED TO THE DEPARTMENT OF EDUCATION MANAGEMENT, POLICY AND CURRICULUM STUDIES IN PARTIAL FULFILMENT OF THE REQUIREMENTS FOR AWARD OF THE DEGREE OF MASTER OF EDUCATION OF KENYATTA UNIVERSITY

JUNE 2012
DECLARATION

This research project is my original work and has not been presented to any university for an award of any degree or program.

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DEDICATION

This work is dedicated to my husband whose understanding, love and support enabled me to complete it. Special dedication to my children Austin and Edna who seemed to wonder why mum was so busy denying them the attention they needed. Dedication is also to my dad, mum, sisters and brothers who encouraged me when I was down.
ACKNOWLEDGEMENT

I am greatly indebted to many people who contributed positively to the success of this work. Acknowledgement is made to the authorities cited in the study; they were a source of inspiration. I am especially grateful to my supervisors Dr. Andrew Riechi and Mr. Kiranga Gatimu for their advice, suggestions, corrections and invaluable support that made this work a success. Special dedication goes to all head teachers, constituency bursary committee and students for their cooperation in filling the questionnaires.

Since a study of this nature is a product of many minds, I am equally grateful to all the people who assisted me in one way or the other towards the successful completion of my studies. May God bless you all.
ABSTRACT

The purpose of the study was to assess the effectiveness of secondary education bursary fund in enhancing equity in its allocation in secondary schools among the poor and vulnerable groups in Migwani district. The objectives of the study were to: establish the structures put in place to ensure equitable distribution of the bursary fund according to laid down criteria and procedures by the ministry of education in Migwani district, establish the number of students who have benefited and the number of deserving cases who have not benefited from the bursary allocation across socio-economic groupings, find out how long it takes to distribute the allocated funds to the needy and if they are sufficient and to recommend ways in which the bursary allocation could be improved to enhance equitable bursary allocation in secondary schools. The study adopted a descriptive survey design. A study sample of 7 principals (23.1%), 138 students (21.4%) and five Constituency Bursary Fund Committee (CBFC) were selected through purposive sampling techniques. The study instruments included interview schedules for the school principals and the CBFC members, questionnaires for the students and document analysis in the sampled schools. Test-retest method was used to test the reliability of the questionnaires while validity of the instruments was determined through guidance from experts who included the supervisors. Data was coded and keyed in the computer for analysis using the Statistical Package for Social Scientists (SPSS). Qualitative data was analyzed thematically according to objectives and presented in narration form according to objectives. Quantitative data were analyzed by use of descriptive statistics such as averages, percentages, mean and range. The findings were presented using frequency distribution tables, bar graphs and pie charts. The study revealed that the process of identifying the needy and deserving cases was hindered by nepotism, politics, flawed vetting process and inadequacy of fund. Therefore some needy and deserving cases failed to obtain the bursary funds. For instance, only a quarter of the applicants succeeded upon application of the bursary funds. The bursary funds also failed to enhance equity in its allocation due to the fact that the disbursement was indefinite and untimely. Recommendations drawn from the study are; the government should increase the bursary funds, the government should come up with mechanisms to reduce political interference, timely disbursement of bursary funds should be ensured and efficiency and fairness of management of bursary funds should be ensured by appointing people of integrity in the management committee and also allocating more time for vetting of the application form.
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<th>Abbreviation</th>
<th>Full Form</th>
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<tr>
<td>ASAL</td>
<td>Arid and Semi-Arid Lands</td>
</tr>
<tr>
<td>BOG</td>
<td>Board of Governors</td>
</tr>
<tr>
<td>MDGs</td>
<td>Millennium Development Goals</td>
</tr>
<tr>
<td>DEB</td>
<td>District Development Board</td>
</tr>
<tr>
<td>ECDE</td>
<td>Early Childhood Development and Education</td>
</tr>
<tr>
<td>EFA</td>
<td>Education for All</td>
</tr>
<tr>
<td>FDSE</td>
<td>Free Day Secondary Education</td>
</tr>
<tr>
<td>GER</td>
<td>Gross Enrollment Rate</td>
</tr>
<tr>
<td>IPAR</td>
<td>Institute of Policy Analysis and Research</td>
</tr>
<tr>
<td>KESSP</td>
<td>Kenya Education Sector Support Programme</td>
</tr>
<tr>
<td>KIPPRA</td>
<td>Kenya Institute of Public Policy Research and Analysis</td>
</tr>
<tr>
<td>MOE</td>
<td>Ministry of Education</td>
</tr>
<tr>
<td>MOEST</td>
<td>Ministry of Education, Science and Technology</td>
</tr>
<tr>
<td>SAPs</td>
<td>Structural Adjustment Programs</td>
</tr>
<tr>
<td>SEBF</td>
<td>Secondary Education Bursary Fund</td>
</tr>
<tr>
<td>OECD</td>
<td>Organization for Economic Cooperation and Development</td>
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CHAPTER ONE

INTRODUCTION

1.1 Background to the study

Education is a human capital which is essential for it is associated with improved health, equity and social conditions in addition to one being socially productive in the society. According to Psacharopolous and Wood hall (1985), a person with education reaps benefit and therefore the provision of education to the population is found to increase the economic growth of a nation. Furthermore, International Bank for Reconstruction and Development (2005) notes that secondary education is closely promoting democratic institutions and civic engagement. In view of the foregoing, it is important for any country to encourage increased investment at secondary school level.

A historical analysis of the patterns and trends of educational financing in Kenya reveals that the financing was based on the cost-sharing policy of 1988. The Government introduced the cost sharing policy through Sessional paper No.6 of 1988 as part of the Structural Adjustment Programmes (SAPs) by the World Bank. Heavy burden of education was mounted to the many poor households. This can be associated to decline of secondary schools Gross Enrolment Rate(GER) from 29.4% in 1990 to 22% in 2000 (Oketch & Rolleston, 2007). The government financed educational administration and professional services while the communities, parents and sponsors, provided physical facilities, supplementary readers, stationery and consumables.

In an effort to reduce the financial burden of poor families in financing secondary education, MOEST established the secondary school Education Bursary Fund (SEBF), in 1994 through a presidential pronouncement. SEBF 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 at increasing enrolment in (and completion of) secondary school. The fund targets orphans and girl children as well as those from poor households and urban slums, who are able to achieve good results.

The bursary fund allocation in the national budget increased from 25 million in 1993/94 to 800 million in 2007/08 financial year (Oyugi et.al (2008). Despite the increased budget allocation aimed at increasing access and equity in secondary education, there has been rising concern on delay in disbursement, inadequate monitoring mechanism and lack of consistency.
In 2003, the increased social demand for education brought about realization of free primary Education, which pushed the demand for secondary education even much higher. The bursary allocation to secondary schools increased from US Dollars 11.5 million in 2003 to 2004, to US Dollars 13.8 million in 2003-2005 (Republic of Kenya, 2006).

**Cost of Secondary School Fees versus Bursary Amounts Given**

Ministry of Education Secondary School Bursary Survey Report (2007) indicates that secondary school fee guidelines were issued by the MOE in 1999 with an aim of making leaving more affordable. The guidelines were introduced to curb arbitrary fee increments by schools which made it difficult for students from poor families to pay. However over the years, there has been little or no adherence to the fee guidelines by secondary school heads. One of the issues sighted for this non-compliance was that the fee guidelines were not realistic as they were set eight years ago and have not been revised since then yet inflation and commodity prices during the same period have gone up considerably.

The guidelines do not take into consideration the specific needs of the school with regard to geographical location, historical background, status and facilities. It is in the line with the overall fee guidelines that he Ministry of Education has given guidelines to the Constituency Bursary Committees (CBCs) with regard to the minimum amounts that should be awarded to bursary applicants. The minimum amounts recommended for applicants of the various categories of secondary schools should be reasonable enough to increase access and equity as follows: Day secondary schools: Kshs.5000; Boarding secondary schools: Kshs. 5000; and National schools: Kshs. 15,000.

Over the past four years the CBCs not complying still award amounts way below the minimum guidelines as shown in Table 1.1

**Table 1.1: Bursary Funds Allocation and Compliance of the CBCs with Allocation Guidelines**

<table>
<thead>
<tr>
<th>Year</th>
<th>Lowest amount awarded</th>
<th>Highest amount awarded</th>
<th>% of CBCs not complying with minimum amount guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>500</td>
<td>65000</td>
<td>29%</td>
</tr>
<tr>
<td>2005</td>
<td>400</td>
<td>38000</td>
<td>46%</td>
</tr>
<tr>
<td>2004</td>
<td>500</td>
<td>33300</td>
<td>71%</td>
</tr>
<tr>
<td>2002</td>
<td>500</td>
<td>25000</td>
<td>87%</td>
</tr>
</tbody>
</table>

*Source: Survey Primary Data (MOE)*
Equity Concerns

The justification for investment in education has already been in summary highlighted. However, if desirable educational outcomes have to be realized, equity issues must be addressed. Educational opportunities must be provided equally among people with emphasis on the less fortunate in society and regions. Equity in education influences the future of income, wealth and status in society. Beyond the economic significance, education is widely viewed as good in itself and indeed a basic human right with regard to the lower levels of education.

For this reason, equity in education is a focus of public policy debate (Mingat and Tan (1988)).

According to John Rawls (1971 and 2001) in his theory of justice says contemporary discussion of social justice owing to the rigorous and original way in which his principle of fair equality of opportunity, equal opportunity for given talents, is nothing but a standard formulation of the restricted interpretation characterized above while his difference principle can be interpreted as a sensible way of capturing whatever there is in the comprehensive interpretation of equality of opportunities that is not already captured by the restricted one.

Achieving equity is an important goal for many governments. The state has two fundamental roles regarding equity. The first is to ensure that everyone has the basic education, the basic competencies necessary to function effectively in society. The second is to ensure that qualified potential students are not denied access to institutions because they are poor or are male from ethnic minorities, live in geographically remote regions or have special education needs.

No qualified student should be unable to enroll because of inability to pay. To determine who is qualified at the compulsory level, a fair and valid means of assessing potential students, and qualifications for entry should be considered. Equity increases efficiency. Considerable evidence now exists that improving educational status of the poor women and the indigenous people increases economic growth and reduces poverty. Investing in the education of girls from poor backgrounds set off a process of intergenerational poverty reduction. Educated women are likely to send their children to school (Summers, 1994).

As earlier noted, the government introduced the bursary fund in 1993/94 financial year and in 2007/08, the government introduced a tuition waiver in all public secondary schools to enable
some children from poor families access education. Total enrolment increased 33.9 percent from 881,328 in 2003 to 1,180,267 in 2007 as indicated in Table 1.2. This may be attributed to sustained reforms and bursary scheme; and expansion programme being undertaken by the Government and also increased demand of secondary education.

Table 1.2: Secondary Enrolment by Gender and Province, 2003-2007

<table>
<thead>
<tr>
<th>Province</th>
<th>2003**</th>
<th>2004**</th>
<th>2005</th>
<th>2006</th>
<th>2007*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Boys</td>
<td>Girls</td>
<td>Boys</td>
<td>Girls</td>
<td>Boys</td>
</tr>
<tr>
<td>Coast</td>
<td>27,235</td>
<td>22,121</td>
<td>31,982</td>
<td>24,724</td>
<td>25,257</td>
</tr>
<tr>
<td>Central</td>
<td>82,338</td>
<td>88,929</td>
<td>91,954</td>
<td>95,468</td>
<td>89,409</td>
</tr>
<tr>
<td>Eastern</td>
<td>84,706</td>
<td>82,181</td>
<td>90,299</td>
<td>86,262</td>
<td>87,730</td>
</tr>
<tr>
<td>Nairobi</td>
<td>11,409</td>
<td>8,803</td>
<td>19,824</td>
<td>13,659</td>
<td>15,935</td>
</tr>
<tr>
<td>Rift Valley</td>
<td>104,689</td>
<td>91,288</td>
<td>112,351</td>
<td>94,724</td>
<td>110,615</td>
</tr>
<tr>
<td>Western</td>
<td>53,559</td>
<td>55,949</td>
<td>60,980</td>
<td>58,208</td>
<td>62,626</td>
</tr>
<tr>
<td>Nyanza</td>
<td>83,319</td>
<td>72,351</td>
<td>84,723</td>
<td>63,274</td>
<td>97,201</td>
</tr>
<tr>
<td>North Eastern</td>
<td>10,872</td>
<td>1,579</td>
<td>3,977</td>
<td>1,657</td>
<td>4,287</td>
</tr>
<tr>
<td>Subtotal</td>
<td>458,127</td>
<td>423,201</td>
<td>496,090</td>
<td>437,976</td>
<td>493,060</td>
</tr>
<tr>
<td>TOTAL</td>
<td>881,328</td>
<td>934,068</td>
<td>928,149</td>
<td>1,030,080</td>
<td>1,180,267</td>
</tr>
</tbody>
</table>

* Provisional
** Revised


Despite the increase in enrollment Republic of Kenya (2009) indicate that more than half of school age population is not accessing secondary education due to costs. It is therefore noted that the government intervention in form of bursary funds and subsidized secondary education have not fully addressed equity issues in secondary education.

1.2 Statement of the Problem

The burden of cost sharing in education and especially secondary education has been over burdening to poor parents. This has resulted in low enrolment in secondary school and high dropout rates in secondary schools because most parents cannot raise school fees. Also due to increasing levels of poverty many secondary students are unable to pay for their secondary education. The government bursary scheme in education was introduced to improve access, increase enrollment, retention and transition and increase equity in secondary education.
From the background, MOEST established the secondary school bursary scheme in 1994 through a presidential pronouncement. SEBF aims to cushion the country’s poor and vulnerable groups against the high and increasing cost of secondary education therefore reducing inequalities. Despite this establishment there were general complaints that the school authorities were not in a better position to identify the needy students and thus allegations that those funds were not being allocated fairly and in a transparent way. In 2003/4 financial year, the NARC government changed the former policy and the bursary scheme is currently channeled through the constituency bursary fund. The allocation is based on the total students enrolled for each constituency. Despite these changes there have been general complaints from students, parents, community, religious leaders and all other stakeholders on how these constituency bursary funds is allocated and distributed to secondary schools so as to benefit the poor and vulnerable groups. The study therefore sought to assess the effectiveness of bursary fund in enhancing equity in secondary education in the new Migwani district.

1.3 The Purpose of the Study

The purpose of the study was to assess the effectiveness of secondary education bursary fund in enhancing equity in its allocation in secondary schools among the poor and vulnerable groups. The study sought to find out who benefits from the bursaries awarded especially for the poor and bright students. It sought to find out the factors that lead to award/or not to award to needy and bright secondary school students in Migwani district.

1.4 Objectives of the Study

The specific objectives of the study were:

1. To establish the structures put in place to ensure equitable distribution of the bursary fund according to laid down criteria and procedures by the ministry of education in Migwani district.
2. To establish the number of students who have benefited and the number of deserving cases who have not benefited from the bursary allocation across socio-economic groupings.
3. To find out how long it takes to distribute the allocated funds to the needy
4. To establish the adequacy of the bursary allocations
5. To recommend ways in which the bursary allocations could be improved to enhance equitable bursary allocation in secondary schools.
1.5 Research Questions

1. Who are the beneficiaries of the bursary scheme?
2. What structures are put in place to ensure equitable distribution of bursary?
3. How long does it take to disburse the bursary funds?
4. Are the bursary funds sufficient for all the deserving cases?
5. How can one describe the criteria used in bursary allocation?
6. To what extent does the bursary fund allocation follow the laid down procedures by the ministry of education?
7. Are the bursary allocations relevant in addressing the equity principle which is one of its objectives?
8. How can the bursary allocation be improved to address equitable distribution to Students in secondary schools education as well as meeting the MDG goal Education for all.

1.6 Basic Assumptions of the Study

The basic assumptions of the study were;
1. That bursary funds were always available.
2. That there was need for better criteria of bursary allocation to achieve equity.
3. That the respondents would give honest answers to the researcher.
4. That the present criterion of bursary allocation was not efficient marred with favourism and misappropriation of funds.
5. That equity principle would provide better bursary allocation

1.7 Limitation of the Study

The study was limited to all the secondary schools in Migwani District.
It limited itself to information on the secondary school bursary allocation only.
Any expansion of the study area would cause heavy financial toll on the researcher in terms of transport costs considering the terrain and remoteness of the district.

1.8 Delimitation of the Study

1. The study was confined within secondary schools in Migwani District.
2. The area had many secondary schools most of which with low student populations.
3. Most of the schools drew their students from the locality except the provincial ones, but even then with very low percentage of pupil heterogeneity.
4. The district was basically pure rural set up and therefore little urban influence on the locals.

1.9 Significance of the Study

The findings of the study could be used to inform the policy makers in coming up with better structures that could ensure more equitable distribution of bursary funds. This is because the bursary fund has not adequately addressed equity as only a few needy cases has benefited. The findings of the study could also important to the government in considering allocation of more bursary funds to cater for all the needy and deserving cases. The findings of the study could also enable the policy makers to draft a time frame and monitoring mechanisms to ensure that delays in disbursement of the bursary funds is minimized.

1.10 Theoretical Framework

The study was based on Kenneth Arrow’s (1921); Theory of general equilibrium. In his article (1951), he argues that competitive economy in equilibrium is efficient and that, any efficient allocation could be reached by having the government use lump sum taxes to redistribute. What Arrow did was to work out a solution on efficiency and fairness. He posits that it is possible to balance excess of competitive markets by adjusting the starting blocks. Placed in the context, the competition for bursary in Kenya is very stiff. The number of applicants is far in excess than the amount of money allocated. The question that needs to be answered is how to balance the demand for bursary against the available funds. At this level, there is need to construct a solution that is both efficient and fair. Efficient in the sense that nobody would be worse off than they were before and fair because more needy students would have a chance to secondary education through bursary allocation without interfering with children from the rich homes. The secondary schools bursary scheme in Kenya is a resemblance of the conclusions that the theory makes. Each secondary school is allocated bursary based on the poverty index of the area/constitution and student enrollment rates. This can be equated to balancing the starting blocks. All the poor and vulnerable but bright students have identical preferences of accessing secondary education without affecting the chances of the rich, who even without government sponsorship will still enroll. This in itself is a pointer to equity and fairness.

The bursary puts the poor and the rich at equal footing for competing for education gains.
It is only fair for the government to disengage from further redistribution when every deserving case has been provided with equal opportunity for competitiveness.

1.11 Conceptual Framework

The conceptual framework in the figure 1.1 below shows how allocation of bursary may help the poor and vulnerable students to achieve equity in secondary education through the access.

Figure 1.1: Bursary provision and secondary school equity in allocation to the poor and vulnerable students.

- Fair and valid identifying the needy and bright.
- Equity and fairness in school bursary allocation.
- Timely allocation of funds.
- Proper management and monitoring of funds.

Source: Researcher

From the framework above, it is clear that when bursary is allocated fairly to the poor and vulnerable, they will have equal access to the secondary education just like the rich who do not need public subsidies.

The equity in the allocation of the bursary can only be achieved if there is fair and valid criterion of identifying the poor, so as to avoid situations where undeserving students benefit and the deserving cases don’t.

Equally important, the allocations of funds must be timely in order to avoid situations that may force students to drop out of schools.

Finally, mechanisms should be put in place to ensure that the beneficiaries receive the money through actual issuance of receipts. Cases abound where schools receive funds but still charge
full fees from the already paid for pupils. Bursary puts the poor and needy at the same level of competitiveness with the rich as it affords them with an opportunity to participate and gain from secondary education. After the students have gained access, it is ones ability that will determine ones chances of further learning, employment, earnings and spillover benefits.

1.12 Definition of Operational Terms

**Equity:** Refers to justice according to natural law or right specifically, a distribution of government resources free from bias or favourism.

**Access:** Refers to the opportunity for the poor and vulnerable to participate in schooling.

**Cost sharing:** Refers to the share of household contributions to supplement state effort in financing education.

**Development expenditure:** It is that portion of the state budget on education that goes into putting up new infrastructure or maintaining the existing ones.

**Direct costs:** This refers to the expenses incurred by households in education for example fees, purchase of uniform and text books.

**Effectiveness:** Use of educational resources in order to achieve desired outcomes.

**Efficiency:** Refers to the use of the lowest amount of inputs to create the greatest amount of outputs.

**Inequality:** Refers to the bias or skewed distribution of educational resources.

**Equality:** Balanced distribution of educational resources across sectors and populations.
**Gross enrollment rate:** Refers to the total pupil enrolled at a given level of learning irrespective of age divided by total population of school going age.

**Indirect costs:** Refers to the earning forgone for example labour due to engagement in education.

**Net enrollment ratio:** Refers to the enrollment of the official age group divided by the total population of school going age.

**Poverty:** A state of being unable to meet ones basic needs due to low income.

**Poverty line:** Standard family income set by a state below which a family is officially classified as poor.

**Recurrent expenditure:** Part of the state budget used to meet payment of salaries and allowances within one year.

**Subsidy:** Money or material intervention by the state to make education cheap and accessible for the poor.

**Transition rate:** Refers to the percentage of graduates who transcend from one level of schooling to another as a percentage of enrolment in previous grade and year.
CHAPTER TWO

REVIEW OF LITERATURE

2.1. Introduction

This chapter covers review of literature related to the study. Literature is first given on the cost of education provision in general, after which a review on financing education in other countries is provided. Literature on financing education in Kenya is then reviewed followed by bursary funding in secondary school, a review of cost of secondary school fees and bursary allocation in Kenya, is provided thereafter. Review of studies on the effects of bursaries on equity concern in education is provided followed by the achievement of equity in education in Kenya. Finally, the chapter gives a summary of the reviewed literature, identifying the gaps that the study sought to fill.

2.2. Cost of Education

According to Kirigo (2007), education involves use of human resources, and financial resources and as such it is never ‘free’ in the real sense of the word. Someone must pay for education. The term ‘free’ in the ‘Free primary education’ means that parents are relieved from direct financial responsibility which is taken up by the government. The government uses taxes and other revenues to fund education which parents are required to surrender their children to the educational institution which is a cost on their part. Nations, societies and individuals in the world invest heavily in education for economic development and social status. Education is a non-material good which cannot be free because to provide it; money is required for training of personnel, employment of professionals, land, buildings, teaching and learning materials (Olembo & Ross,1992). As a durable good, education is costly. However, it has a multiplier effect in that it benefits, the government, the society at large and individuals. It is a producer as well as a consumer good. It is a commodity to sell in order to be bought for the learner benefits. Education is one of the basic rights. Article 28 and 29 of the United Nations convention on the rights of the child (1989), as quoted by Nyaga (2005), states that it is the right of every child to have access to education. In its effort to provide education for all citizens, the
government’s expenditure on education in Kenya continues to rise (Eshiwani, 1994) and requires both the parents and beneficiaries to contribute towards it. This has previously been done to some extent through community efforts like Harambee (fundraising activities) that helped lower the government development expenditure on education. Kamunge Report (Republic of Kenya, 1988) recommended that parents and community supplement the government efforts by providing educational institutions with equipment and funds to procure teaching and learning materials in the spirit of cost sharing policy. Parents have also to provide their children with other requirements of the school which include books, prescribed items, uniform and boarding requirements among others. The cost sharing policy was to be continued and strengthened as one of the strategies to help the government achieve the stated objectives in the financing of education and training. The government finances education by providing administration and professional services while the parents and guardians meet all other costs through payment of school fees.

2.3. Secondary School Financing Internationally

Education has been viewed as a critical factor in development especially with reference to the development of human resources for social economic development (Agosto, 1996). In this regard, governments all over the world have devoted large shares of public finance to education sector.

Hirsch (1973) notes that most countries finance 1st and 2nd levels of education from tax revenue of the state. Briseid and Caillods (2004) concur by stating that OECD countries spend a great deal of resources on their secondary education such that at secondary school level students’ education cost an amount roughly equivalent to 24% of GDP per capita. To facilitate access to secondary education, no tuition fees are charged in state schools until the end of secondary education and not often until end of secondary education. OECD (2009) notes that OECD countries as a whole spend US$ 8,857 per student each year for primary, secondary and tertiary education. However, spending varies widely among individual countries from US $ 4,000 per student or less in Mexico, Poland, The Slovak Republic and Turkey to more than US$ 10,000 in Austria, Denmark, Norway, Switzerland and the USA. Public funding of education in OECD countries is a social priority accounting for 13.3% of total public expenditure. Countries like Czech Republic have made financing of secondary education more affordable by increasing the teacher load, increasing teacher intensity in
terms of the pupil–teacher ratio, merging schools with low enrolment and use of computers in teaching (OECD, 1991). These are cost saving measures meant to reduce current expenditures which can reach alarming rates. Briseid and Francoise (2004) noted that in most OECD countries, families must pay for meals, school supplies, extra-curricular activities and uniforms. Families who cannot afford generally receive a scholarship or benefits from a reduction in costs. However, in few countries schools meals are free (Finland) or subsidized depending on the resources of the families (France and some states in the USA).

Fast growing economies such as Korea, Brazil, India and Indonesia spend 39-50% of their education budget on secondary education while developing economies append relatively low percentage (KIPPRA, 2009).

The table below shows that most of the developing countries spent a large portion of their education budget in primary education in 1995.

Table 2.1: Percentage distribution of public expenditure on education by levels in selected countries in 1995

<table>
<thead>
<tr>
<th>Country</th>
<th>Primary education (%)</th>
<th>Secondary Education (%)</th>
<th>Tertiary Education (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Congo</td>
<td>50.4</td>
<td>11.6</td>
<td>28.0</td>
</tr>
<tr>
<td>Burundi</td>
<td>41.5</td>
<td>39.9</td>
<td>15.6</td>
</tr>
<tr>
<td>Malawi</td>
<td>58.8</td>
<td>8.9</td>
<td>20.5</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>50.8</td>
<td>26.1</td>
<td>14.9</td>
</tr>
<tr>
<td>Guinea</td>
<td>35.1</td>
<td>29.6</td>
<td>26.1</td>
</tr>
<tr>
<td>Swaziland</td>
<td>36.1</td>
<td>26.4</td>
<td>27.5</td>
</tr>
<tr>
<td>Zambia</td>
<td>41.5</td>
<td>18.4</td>
<td>23.2</td>
</tr>
</tbody>
</table>


From Table 2.1, the highest percentage of national budget is spent on primary education. Malawi devoted the least percentage of national budget to secondary education and the
highest to primary education. Congo and Zambia also spent less than 20% on secondary education.

Fiske and Ladd (2003) found that, in South Africa a governing body of public schools must make all reasonable measures within its means to supplement the resources supplied by the state. The setting of fees is optional in the sense that a school can impose such fees only when authorized to do so by a majority of parents attending a budget meeting at the school. Children cannot be denied admission for failure to pay the fees but the school can sue the parents for non-payment. However some parents with extreme low income are exempted from paying such fees.

Rwanda abolished lower secondary education in 2006 followed by Uganda in 2007. The two governments were concerned of low transition rates from primary schools to secondary schools due to limited places and high fees resulting to many qualified pupils to drop out after completing primary education (Ohba, 2009). The Uganda government expected the free secondary education to double the number of children continuing in school (Reuters, 19 Feb 2007). The program was expected to cost 30 billion Uganda shillings (US$ 17.15 Million). Despite these initiatives by governments in Sub-Saharan countries, education systems are facing increasing problems of financial nature. Since 1960s, education budgets grew much faster than GDP in most developing countries (Bennet, 1975). Due to severe budget constraints, where the governments extend free education they often allow the public school students who are needy and unable to allocated bursary funds so as to give them equal opportunity of accessing education (Fedha Flora 2008).

2.4. Secondary School Financing in Kenya

A historical analysis of the patterns and trends of education financing in Kenya shows the existence of partnership between the state, households, communities, NGOs, religious organizations, development partners and private sector (Government of Kenya, 1988). In the 1970s, the provision of secondary education expanded rapidly due to the growth of (Harambee- self help) schools which accommodated 25% of the school age cohort by 1980. Due to poverty, the harambee schools had inadequate facilities such as fewer libraries, unequipped laboratories, less textbooks and equipment. (Ogot & Ochieng, 1985). Mwiria (1990) had also noted that most Harambee schools could not meet their recurrent costs and
thus were restricted to cheaper purely academic curriculum. With those shortcomings, the quality of education offered was questionable.

Introduction of cost sharing policy created a heavy burden on households, communities met the cost of key non-salary inputs like tuition, textbooks and uniforms. The government on the other hand met the cost of specialized equipment, bursary and scholarships for the needy students, teacher remuneration in public schools and in-service training (KIPPRA, 2006). Njeru and Orodho (2003) estimated current expenditure in education of between 30% to 44% of household annual incomes (approximately Kshs. 24,370 per child in secondary school education). Thirty seven percent of this cost was spend on indirect costs, such as uniforms, stationery, pocket money and transport. On average, household funding of secondary education was 60% while government financing constituted 40%.

2.5. Criteria for Bursary Allocation to Secondary Schools

Until the end of 2002/2003 fiscal year the bursary allocation from the MOEST were allocated on the following criteria:

National schools received 5% of the total national allocation. An equivalent of 25% of the 95% total national allocation was set aside for ASAL districts and the remaining 75 % was allocated to all public schools including those in the ASAL districts based on enrolment (Republic of Kenya, 2004). According to Orodho (2003) the amount allocated to schools within a district was calculated using the formula;

\[ D = \frac{B \times Se}{Ne} \]

Where D= District bursary allocation
B = Total MOEST Bursary for the fiscal year (Kshs)
Se= Total Student enrolment
Ne= Total National students enrolment.

Providing guidelines for disbursement of bursaries Republic of Kenya (2003) stipulated that secondary school bursaries should be awarded to the needy and bright children and pockets of poverty in high potential areas. However, the bursary allocation places no special emphasis on such areas as different levels of poverty across the country, schools with low enrollment, monitoring, feedback, and audit of bursary utilization. New entrants into the secondary
school cycle and clear criteria on awarding the bursaries except that they are meant for the poor and bright children (Republic of Kenya, 2007) according to Orodho (2003) the bursary scheme does not consider differences in students performance nor the needy and vulnerable students in its allocation.

The bursary scheme, which is to cushion the poor and vulnerable students, has not been able to do so adequately because it uses improper methods of identifying needy students. For instance, some informal testing is employed and the available bursary is divided among identified schools (Muthoni, 2008).

2.6. Secondary Education Bursary Fund

According to Oyugi, Riechi and Anupi (2008), the demand for schooling is influenced by economic, political, social and cultural factors. The provision of schooling is largely determined and financed by governments, which spend significant resources on education. While such outlays have led to a tremendous expansion of schooling, they have not reduced the level of disadvantage for many groups especially those residing in rural areas, including poor people, women ethnic or religious minorities and indigenous peoples. Many countries of the world have committed themselves to the Millennium Development Goal and Education for All which aim at achieving Universal primary Education by 2015. In an attempt to meet this international commitment and improve the quality of public education services and the equity which public funds are disbursed, some governments are experimenting with new ways of channeling public funds.

The MOEST operates a bursary scheme at the secondary school levels as part and within the social dimension of development programme, targeting the poor and vulnerable households. The major objective of the scheme is to enhance access to and ensure high quality secondary education for all Kenyans, especially the poor and vulnerable households, (Ondima, 2006). The major objective of the scheme is to enhance access to and ensure high quality secondary education for all Kenyans, especially the poor and vulnerable groups as well as the girl child. The driving philosophy behind the scheme is that no child who qualifies for secondary education should be denied access on such accounts as inability to meet school fees. It was envisaged that collaborative contributions through location and constituency bursary funds,
support from NGOs, well-wishers and philanthropists would have considerable inputs in assisting the poor and vulnerable households (Orodho & Njeru, 2004).

2.7. Concern about Equity

The justification for investment in education has already been in summary highlighted above. However, if desired educational outcomes have to be realized, equity issues have to be addressed. Educational opportunities must be provided equally among people with more emphasis on the less fortunate in society and regions; with more learning to areas with the highest poverty indexes. In most countries, governments subsidize education so access to education determines who benefits from the subsidies. Furthermore, education affects people’s life chances as adults in terms of their earning capability as well as social mobility. Equity in education therefore influences the future distribution of income, wealth and status in society. Beyond the economic significance, education is viewed as good in itself and in deed a basic human right with regard to the lower levels of education. For this reason too, equity in education is a focus of public policy debate (Mingat & Tan, 1995 quoted from the World Bank, 1995).

Achieving equity is an important goal for many governments. The state has two fundamental roles regarding equity. The first is to ensure that everyone has the basic education- the basic competencies necessary to function effectively in society. The second is to ensure that qualified potential students are not denied access to institution because they are poor or are male and are from ethnic minorities, live in geographically remote regions or have special education needs. No qualified student should be unable to enroll because of inability to pay. To determine who is qualified at the post compulsory level a fair and valid means of assessing potential students’ qualifications for entry should be considered (Ondimu, 2006). Considerable evidence now exist that improving educational status of the poor women and the indigenous people increases economic growth and reduces poverty. Investing in the education of girls from poor backgrounds set off a process of intergenerational poverty reduction. Educated women are likely to send their children to school (Summer, 1994).

Perhaps bothered by the question of equity and its accompanying benefits, most LDC spend much of their G.D.P in education with the aim of equalizing opportunities for development among its citizenry and thereby provide a major escape route from the devastating effects of poverty. For example, although educational financing in Kenya reveals an existence of a
partnership between the state, households and communities long before the introduction of cost-sharing policy IPAR(2003), average state spending on education and training ranges between 5 and 7 percent of the GDP Republic of Kenya(2003). Of the total allocations, a substantial percentage is directed to the funding of the core poverty reduction education programs such as early childhood education and development (ECDE) free primary education (FPE) and Secondary School Bursary Scheme.

2.8 Summary of the Literature Review

The literature review revealed that governments all over the world commits large share of national budget to education. Primary education receives the largest share of education budget in most developing countries. SSA countries have recognized the role of secondary education in economic development and thus several countries including Rwanda, Uganda, South Africa and Kenya have initiated fee free policy. However, due to high cost of secondary education coupled with budgetary constraints, the government funding for secondary education is inadequate. The government of Kenya also offer bursary fund award to needy students in secondary schools. The major objective of the scheme is to enhance access to secondary education especially to the poor and vulnerable groups in the society. Several studies have highlighted the limitations of bursary fund such as; inadequacy of funds, improper methods of identifying the needy students, lack of consistency in the awards, delay in disbursement among others. Limited studies had been carried out the effectiveness of bursary fund in enhancing equity in secondary education. This study was therefore carried out to investigate the effectiveness of bursary fund in enhancing equity in secondary education in Migwani District, Kitui County.
CHAPTER THREE

RESEARCH METHODOLOGY

3.1 Introduction

This chapter presents the study design, locale, target population, sample and sampling technique, research instruments, piloting procedure and data analysis and presentation.

3.2 Study Design

This study adopted descriptive survey design. Lockesh (1984) states that descriptive studies are designed to obtain pertinent and precise information concerning the current status of phenomena and whenever possible to draw valid general conclusion from the facts discovered. Orodho (2009) concurs by stating that, descriptive survey allows a researcher to gather information, summarize, present and interpret for the purpose of clarification. Mugenda and Mugenda (1999) also noted that surveys can be used in explaining or exploring the existing status of two or more variables at given point in time. It is against this background that this descriptive survey was found appropriate in investigating the effectiveness of the bursary fund in enhancing equity in secondary education in Migwani District, Kitui County.

3.3 Study locale

The study was conducted in Migwani District in Eastern Province of Kenya. The area is known to be a hardship zone due to its dryness and drought. The main economic activity is peasant farming in pieces of land averaging two acres. However, the district has minimal rainfall to support agriculture meaningfully. This has greatly contributed to the poverty owing to the unreliable weather conditions. Poverty levels have been on increase
hence a negative influence on education as well as the need for bursary for the poor and needy. The researcher preferred this area in carrying out the study due to the familiarity and professional interest. According to Borg and Gall (1989), the ideal setting for any study is the one that is directly related to the researcher’s interest.

3.4 Targeted Population

The targeted population comprised of the 29 public secondary schools, all the principals, all students in the 29 secondary schools and the constituency bursary fund committee members in Migwani District. Of the twenty-nine schools, three were provincial girls boarding, two provincial boys boarding, eleven districts mixed day schools, six district girls boarding and seven district boys boarding secondary schools.

3.5 Sampling Technique and Sample Size

Four of the schools which were provincial schools, were purposively selected due to their composition and operation nature, the other three was one mixed district boarding , one girls only district and one boys only day school. This made a study sample of seven schools (24.1%). All the principals of the sampled schools participated in the study. One hundred and thirty eight students (22.1%) comprising sixty-nine boys and sixty-nine girls from the sampled schools also participated in the study. According to Kothari (1985), a sample of 10% to 30% is appropriate for descriptive studies. The study sample also comprised of five CBC members (100%). Table 3.1 shows the study sample while table 3.2 shows the sampling grid summary.
Table 3.1: The study sample

<table>
<thead>
<tr>
<th>Category of schools</th>
<th>Schools</th>
<th>Head teachers</th>
<th>Bursary committee members</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total</td>
<td>Total</td>
<td>Total</td>
</tr>
<tr>
<td></td>
<td>sample</td>
<td>sample</td>
<td>members</td>
</tr>
<tr>
<td>District girls</td>
<td>6</td>
<td>6</td>
<td>_</td>
</tr>
<tr>
<td></td>
<td>1</td>
<td>1</td>
<td>_</td>
</tr>
<tr>
<td>District boys</td>
<td>7</td>
<td>7</td>
<td>_</td>
</tr>
<tr>
<td></td>
<td>1</td>
<td>1</td>
<td>_</td>
</tr>
<tr>
<td>Provincial girls</td>
<td>3</td>
<td>3</td>
<td>_</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>2</td>
<td>_</td>
</tr>
<tr>
<td>Provincial boys</td>
<td>2</td>
<td>2</td>
<td>_</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>2</td>
<td>_</td>
</tr>
<tr>
<td>District mixed</td>
<td>11</td>
<td>11</td>
<td>_</td>
</tr>
<tr>
<td></td>
<td>1</td>
<td>1</td>
<td>_</td>
</tr>
<tr>
<td>Total</td>
<td>29</td>
<td>29</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>7</td>
<td>7</td>
<td>5</td>
</tr>
</tbody>
</table>

Table 3.2: Sampling Grind

<table>
<thead>
<tr>
<th>Category</th>
<th>Population size</th>
<th>Sample(n)</th>
<th>Percentage (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schools</td>
<td>29</td>
<td>7</td>
<td>24.1</td>
</tr>
<tr>
<td>Principals</td>
<td>29</td>
<td>7</td>
<td>24.1</td>
</tr>
<tr>
<td>Students</td>
<td>624</td>
<td>138</td>
<td>22.1</td>
</tr>
<tr>
<td>CBC Members</td>
<td>5</td>
<td>5</td>
<td>100</td>
</tr>
<tr>
<td>Total</td>
<td>687</td>
<td>157</td>
<td>22.3</td>
</tr>
</tbody>
</table>

3.6 Research Instruments

Research instruments are tools for collecting data (Borg and Gall, 1983:381). There are a number of them, a researcher can select which to use depending on the nature of study,
the kind of data to be collected, and the kind of population targeted (Orodho, 2004). Data was collected by use of; Student questionnaires, Interview schedules for Head teacher and CBC members on the effectiveness of bursary fund allocation in enhancing equity and document analysis

3.6.1 Students Questionnaires

The researcher constructed one questionnaire for the students. The items in the questionnaire were both open-ended and closed-ended. Borg and Gall (1983) emphasize that whereas the open-ended types of questions give informants freedom of response, the closed ended types facilitate consistency of certain data across informants. The bursary fund effectiveness questionnaire for students contained three sections. The first section collected background information of the students. The second section of the questionnaire contained items to measure the financial situation of the student’s parents / guardians. The third section had items to collect data related to bursary fund allocations. The questionnaire was used for data collection because as Kiess and Bloomquist (1985) observes, it offers considerable advantage 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.

3.6.2 Bursary Fund Interview Schedule for principals and CBC members.

The researcher constructed two interview schedules i.e. Bursary fund effectiveness interview schedule for school principals and bursary fund effectiveness interview schedule for constituency bursary committee. They were used to guide interview to be held with school principals and school bursary committee members. An interview schedule is considered appropriate when the sample is
small since a researcher is able to get more information from respondents that would be possible using a questionnaire (Kiess and Bloomquist, 1985).

3.6.3 Document Analysis Guide

The researcher also conducted document analysis whereby records of students who applied for bursaries and those who had benefited from bursary scheme for the period 2008-2010 were analyzed.

3.7 Pilot Study

Before collecting data for this study, the researcher carried out a pilot study in two randomly selected secondary schools in Migwani District. Ten students in forms three and form four in each of the two schools were selected to fill the questionnaires. Others included in the pilot study were the head teachers of the selected schools who were interviewed. A member of CBC was also interviewed. All those who participated in the pilot study were not included in the main study. The pilot study was necessary to determine the validity and reliability of the research instruments. Piloting of both the questionnaires and interview schedules was therefore carried out to detect any weakness such as vague statements in order to take corrective measures. Piloting also helped the researcher to determine whether the respondents understood the questions.

3.7.1 Validity of the Instruments

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.
Borg and Gall (1989) define validity as the degree to which a test measures what it purports to measure. The pilot study helped to improve face validity of the instruments. According to Borg and Gall (1989), content validity of an instrument is improved through expert judgment. The researcher approached the two supervisors independently in order to seek expert judgment on the relevance of the questionnaires developed. Their recommendations were incorporated in the revised questionnaires.

3.7.2 Reliability of the Instruments

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. Therefore reliability is concerned with the consistency of an instrument in obtaining similar results under the same conditions over a period of time. The instruments were tested using test re-test technique. This involved administering the same instrument twice to the same group of respondents in two secondary schools in a span of two weeks. From the two administrations, spearman rank order correlation of 0.823 was computed. Orodho (Ibid) states that a co-relation coefficient of about 0.75 should be considered high enough to judge the reliability of the instrument and the researcher adopted this recommendation.

3.8 Data Collection Procedure

The researcher obtained an introduction letter from Kenyatta University and a research permit from the National Council for Science and Technology. After this, the researcher booked an appointment with the sample schools through the head teachers to visit and administer the questionnaires. The researcher then visited 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. The researcher booked
appointments with the head teachers and school bursary committee members on dates when interviews would be held.

3.9 Data Analysis Procedure

Data collected was coded and entered into the computer for analysis using the Statistical Package for Social Sciences (SPSS). Descriptive statistics including percentages frequency distribution, averages, percentages, and mean were used to analyze the 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, since they are easily understood. Qualitative data was analyzed thematically according to objectives and presented in narration form according to objectives. The findings were presented using frequency distribution tables, bar graphs, line graphs and pie charts. Borg and Gall (1985) also hold that the most widely used and understood standard proportion is the percentage.
CHAPTER FOUR

DATA ANALYSIS, PRESENTATION, AND DISCUSSIONS

4.1. Introduction

The purpose of the study was to assess the effectiveness of secondary education bursary fund in enhancing equity in its allocation in secondary schools among the poor and vulnerable groups. The analyzed findings of the study are presented in this chapter based on the research objectives, which were:

1. To establish the structures put in place to ensure equitable distribution of the bursary fund according to laid down criteria and procedures by the ministry of education in Migwani district.
2. To establish the number of students who have benefited and the number of deserving cases who have not benefited from the bursary allocation across socio-economic groupings.
3. To find out how long it takes to distribute the allocated funds to the needy and if they are sufficient.
4. To establish the adequacy of the bursary allocations.
5. To recommend ways in which the bursary allocation could be improved to enhance equitable bursary allocation in secondary schools.

4.2. Descriptions of schools involved in the study

Seven secondary schools out of 29 secondary schools (24.1%) were involved in the study. All the schools are in the rural setting. The schools were selected using Stratified sampling technique and purposive sampling technique. The sample schools consisted of 1 district girls schools, 1 district boys school, 1 provincial boys and girls school each and 3 district mixed secondary schools.
4.2.1 Descriptions of the Respondents.

The respondents comprised of seven principals (24.1%), 138 form three and four students (69 boys and 69 girls), (21%) from the sampled schools and 5 members of Constituency Bursary Committee.

4.2.2 Background Information of the Students

The sampled students comprised of 69 girls (50%) and 69 boys (50%) drawn from form three and form four in the sampled schools. Their age raged from 17 years to 19 years, that is, 51 students (37.0%) were 17 years old, 63 students (45.6%) were 18 years old while 24 students 17.4% were 19 years old. As far as the family background is concerned, 104 students (75%) lived with both parents, 23 students (16.7%) each lived with one parent while 11 students (8.3%) lived with a guardian. Regarding the occupations of the parents/guardians the students responses are presented in figure 4.1

Figure 4.1: Occupation of the Parents/Guardians of the Sampled Students.
Figure 4.1 shows that 70 fathers of the sampled students (50.7%) were peasant farmers since the harsh climatic conditions are not conducive for farming. Fifty four mothers (39%) had no work which implies that they were house wives. It can also be noted that more mothers were small scale business persons than fathers. There are also a considerable numbers of retired parents. In addition, it can be noted that employed parents are quite few (16.7%). This background therefore confirms the poverty levels of the respondents as far as social economic status is concerned.

4.3. Structures put in Place to Ensure Equitable Distribution of the Bursary Fund According to Laid down Criteria and Procedures by the Ministry of Education in Migwani District.

The first objective was to establish the structures put in place to ensure equitable distribution of the bursary fund according to laid down criteria and procedures by the ministry of education in Migwani district.

The researcher sought to find out the structures put in place for dissemination of information about bursary funds. According to the principals, information about bursary funds was communicated to parents in general meetings and newsletters. The principals also stated that they communicated to students about bursary funds during schools assemblies. All the students admitted that they have ever heard of bursary funds. When asked how they learn of bursary funds, the students stated different sources as indicated in Table 4.1

Table 4.1: Source of Information about Bursary Funds by Students

<table>
<thead>
<tr>
<th>Source of Information About Bursary Funds</th>
<th>Number of Students</th>
<th>Percentage (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Head teachers</td>
<td>114</td>
<td>82.6</td>
</tr>
<tr>
<td>Teachers</td>
<td>83</td>
<td>60.1</td>
</tr>
<tr>
<td>Parent/guardian</td>
<td>22</td>
<td>15.9</td>
</tr>
<tr>
<td>Community/religious leaders</td>
<td>17</td>
<td>12.3</td>
</tr>
</tbody>
</table>
Source (students Questionnaires)

Table 4.1 shows that majority of students (82.6) learnt about bursary funds from the head teachers. Teachers were also sources of information about bursary funds as reported by 60.1% of students. Other sources of information about bursary funds were parent/guardians and community/church leaders as stated by 15% and 12.3% of students respectively.

It can hence be argued that dissemination of information about bursary funds is adequate as it comes from various sources. This study therefore agrees with Oyugi (2010) that there are various source of information about bursaries including school administration, chief’s office, and places of worship.

According to the principals, the CBC members identify the needy cases through bursary application forms. The principals issue the forms to students after giving them information on the categories of the students eligible to apply for the bursary funds. The duly applied forms are then submitted to CBC for scrutiny after which they (CBC) decides who should benefit from the bursary fund. The CBC members interviewed affirmed the views of the principals by stating that they are the ones involved in the determination of the beneficiaries of the bursary scheme.

The researcher sought to find out whether the structures put in place ensured equitable distribution of the bursary schemes. According to the principals both male and female students applied for bursary equally and had equal chances of benefiting. Orphans and students from the low income families had the higher chances of receiving bursary. This is a positive gesture since the main role of bursary funds is to assist needy students. However, the majority of head teachers (80%) confirmed that some needy cases were not receiving bursaries. This may be attributed to inadequate bursary funds from the government. According to Wachiye and Nasongo (2010) on a study on access to secondary school education through the constituency bursary fund in Kanduyi constituency found out that bursary allocations were rather low and inadequate. Twenty per cent of students also indicated that the system of bursary award was interfered through political patronage and nepotism leading to undeserving students benefiting from
the bursary kitty. It also emerged that parents/guardians had to keep on pushing and checking to see whether their children were successful in the application. According to the CBFC members numerous application forms rendered vetting process difficult. This could mean that some right applicants could miss out the bursary funds.

From the ongoing, it be noted that the structures put in place to ensure equitable distribution bursary funds were succeeding in addressing equity in terms of income by identifying the right beneficiaries. However, in some cases undeserving students benefitted from the bursary funds due to flawed vetting process, political patronage and nepotism. Inadequate bursary funds also hampered the award of bursary funds since many deserving cases were not benefiting. Wachiye and Nasiongo (Ibid) also noted that political leaders interfered with bursary awarding leading to some undeserving students benefiting from the funds.

4.4. **Number of Students who benefitted from bursary funds and the Number of Deserving Cases who not did benefit**

The second research objective was to establish the number of students who benefitted from bursary funds and the number of deserving cases who did not benefit.

To address this objective the researcher gathered data from the principles interview, CBFC member’s interview, students’ questionnaires and from documents analysis. Table 4.2 shows the number of students who applied for bursary and the number of students benefitted as obtained from document analysis.
Table 4.2  Bursary Funds Applicants versus the Successful Applicants in the Sampled Schools

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Applicants</th>
<th>Recipients</th>
<th>% of the recipients</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>1309</td>
<td>302</td>
<td>23.1</td>
</tr>
<tr>
<td>2009</td>
<td>1403</td>
<td>307</td>
<td>21.8</td>
</tr>
<tr>
<td>2010</td>
<td>1472</td>
<td>353</td>
<td>24.0</td>
</tr>
<tr>
<td>2011</td>
<td>1563</td>
<td>376</td>
<td>24.1</td>
</tr>
</tbody>
</table>

Source: Documents analysis in the sampled schools and students questionnaires.

Table 4.3 shows that the number of applicants kept on rising from the year 2008 to 2011. Similarly, the number of successful applicants kept on rising but at a very low percentage. The average percentage of the recipients for the period was 23.1%.

According to the principals, the proportion of students who benefited after applying for bursaries was too small. It was majorly reported by the principals that the successful applicants for the bursary allocation were about a quarter (25%). This is very close to what is presented in table 4.3 showed that the average successful bursary applicants between the years 2008 and 2011 were approximately 23.1%. The principals also asserted that for those who were successful the amounts fluctuated in subsequent applications. Sometimes the applicants could obtain more funds in other times less funds.

The opinions of the CBFC members showed that about 20% of applicants benefitted from the bursary funds. Most of the students (97%) felt that they deserved to be awarded bursary. However, as noted from table 4.3 only about a quarter succeeded between 2008 and 2011 implying that about 75% of bursary demand was unmet.
From the above data it can be argued that only a few deserving cases succeeded in bursary application. Given the conditions of the locale whereby majority of parents and guardians are poor, it may be argued that the bursary funds were inadequate to cater for all the needy students. According to Oyugi (2010) about 66% of bursary demands were unmet implying that about 34% of bursary demand was met.

All the principals also asserted that majority of the students who benefited from the bursary funds still had huge balances uncleared. This meant that students had to be sent home for fees balances. When asked whether they had ever been sent home for fees, the students responses were as presented in figure 4.2.

**Fig 4.2: Students ever sent home for fees and those never sent home for fees**

![Pie chart showing 93% of students ever sent home for fees and 7% never sent home for fees.]

Figure 4.1 shows that majority of students (93%) indicated that they had at a time sent home for fees while only 7% of students had never been sent home for fees. These responses confirm the nature of the needy cases in the district as earlier indicated. It still confirms that the bursary funds were falling short of addressing equity issues in the
The researcher further sought to find out from the students the number of times they were sent home for fees. Their responses are presented in table 4.3

### Table 4.3: Number of Times Students were Sent Home for Fees

<table>
<thead>
<tr>
<th>Number of times sent home for fees</th>
<th>No. of students</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nil</td>
<td>10</td>
<td>7.2</td>
</tr>
<tr>
<td>Once</td>
<td>11</td>
<td>7.9</td>
</tr>
<tr>
<td>Twice</td>
<td>17</td>
<td>12.4</td>
</tr>
<tr>
<td>Thrice</td>
<td>76</td>
<td>55.1</td>
</tr>
<tr>
<td>Over three times</td>
<td>24</td>
<td>17.4</td>
</tr>
</tbody>
</table>

**Source: Students questionnaires**

Table 4.3 shows that majority of students (55.1%) were sent home for fees thrice in a term while 17.4% were sent home for fees over three times in a term. This implies that 72.5% were sent home for fees thrice or more times in a school term. A further 12.3% of students indicated that they were sent home twice per term while 7.9% of students indicated that they were sent home for fees once in a term. Only 7.2% of students stated that they were not sent home.

According to the interview with the principals, it emerged that when sent home for fees the students managed to return with only little money pledging to give more at a future date. The researcher also enquired about the duration taken by students to return to school after being sent home for fees and the responses presented in table 4.4.
Table 4.4: Duration Taken by Students to Return to School after Being Sent Home for Fees

<table>
<thead>
<tr>
<th>Duration Taken to Return to School</th>
<th>Number of Students</th>
<th>% of Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2 days</td>
<td>3</td>
<td>2.2</td>
</tr>
<tr>
<td>3-5 days</td>
<td>47</td>
<td>34.1</td>
</tr>
<tr>
<td>1 week</td>
<td>69</td>
<td>50.0</td>
</tr>
<tr>
<td>More than a week</td>
<td>19</td>
<td>13.7</td>
</tr>
</tbody>
</table>

Source: Students questionnaires

Table 4.4 shows that majority of students (50%) took a week to return to school while 34.1% of students took 3-5 days. About 13.7% of students took more than a week to return to school while a lower percentage (2.2%) of students took 1-2 days to return to school.

The above data shows that majority of students lost many school days due to balances in school fees. For instance those who took a week to return (50%) lost about three weeks at home if sent thrice in a term. This shows a limitation of the bursary in addressing absenteeism brought about failure to pay all the school fees. It can hence be argued that the bursary fund fell short of tackling equity issues in ensuring that all the students rich and poor were retained in school.
4.5. Duration Taken to Distribute the Allocated Bursary Funds

The third research objective was to find out the duration taken to distribute the bursary funds.

According to the principals, the bursary money was mainly released to schools in 2\textsuperscript{nd} and 3\textsuperscript{rd} terms. However, the funds were rarely released to schools in first term. The opinions of the principals were concurred with those of CBFC members who stated that bursary funds were released in schools mainly during the second and third term every year. This implies that the needy students could not rely on bursary funds during first term. When asked the duration taken for the bursary funds to be received after application, the principals gave varied views as presented in figure 4.3.

Fig 4.3: Principals Responses on Duration Taken to Receive Funds after Application

Figure 4.2 shows that majority of the principals (34\%) were of the opinion that it took one month for students to receive bursary after application. Thirty one percent of principals stated that it took 2 months while 18\% principals indicated that it took three
months and above for bursaries to be received after application. Minority of principals (17\%) felt that it took two weeks for bursaries to be received after application.

The researcher also enquired from the students about how long it took to be awarded bursary after application. Figure 4.1 shows the responses of the students on duration taken to receive the bursary funds after application.

Figure 4.4: Students Responses on Duration Taken to Receive Bursary after Application

![Bar Chart]

Figure 4.4 show that 47 students (64.9\%) stated that bursary funds took one month to receive bursary after application. Forty-three students and 25 students stated it took 2 months to receive and three months and above respectively to receive bursary funds after application. Twenty-three students were of the opinion that it took two weeks to receive bursary after application.

From the above data it can be noted that duration taken to receive the bursary funds varied from two weeks to three months and above. This implies that the allocation of bursary funds don’t have a definite period. It can also be noted that sometimes there is delay in the disbursement of bursary funds as it can take up to three months and above at times. This delay is a big blow as the funds are meant to address equity issues. It implies
that needy students have to be sent home for fees as earlier reported. Nyachieya and Nasongo (2010) and Oyugi (2010) also established that there is delay in disbursement of bursary funds, which hampered its effectiveness in addressing their objectives.

4.6. Ways of Improving Bursary Scheme to Enhance Equitable Bursary allocation in secondary schools

The fourth research objective sought to find out ways of improving bursary scheme to enhance equitable bursary allocation in secondary schools. The researcher solicited the suggestions from the principals and CBFC members’ interviews. According the principals the bursary allocation should be done at school by school bursary committees because they understand the students better. Though this might seem true, the researcher argues that it might encourage more nepotism and canvassing. Another suggestion by the principals is excluding the politicians in the CBFC. The researcher agrees with this suggestion. However, the politicians being important stakeholders in education matters they should only be excluded in the allocation process but not in overseeing that equity is ensured together with District Education Board (DEB). The principals also suggested that the government should increase the bursary fund to ensure more needy students benefit. Finally, majority of the principals advocated for the timeliness in bursary fund disbursement in order to minimize absenteeism caused by school fees problems.

According to the CBFC members, the government should allocate more funds. The CBFC were also of the opinion that the time for vetting should be increased in order to thoroughly go through the numerous forms. The CBFC also advocated for timely disbursement of the funds from the government.
CHAPTER 5
SUMMARY, CONCLUSION AND RECOMMENDATIONS

5.1. Introduction

The purpose of the study was to assess the effectiveness of secondary education bursary fund in enhancing equity in its allocation in secondary schools among the poor and vulnerable groups. This chapter contains a summary of the findings and recommendations based on the findings. Further research areas are also suggested.

The objectives of the study were:

1. To establish the structures put in place to ensure equitable distribution of the bursary fund according to laid down criteria and procedures by the ministry of education in Migwani district.
2. To establish the number of students who have benefited and the number of deserving cases who have not benefited from the bursary allocation across socio-economic groupings.
3. To find out how long it takes to distribute the allocated funds to the needy and if they are sufficient.
4. To establish the adequacy of the bursary allocations.
5. To recommend ways in which the bursary allocation could be improved to enhance equitable bursary allocation in secondary schools.

The study adopted a descriptive survey design. Seven secondary schools out of 29 secondary schools (24.1%) were involved in the study. All the schools are in the rural setting. The schools were selected using Stratified sampling technique and purposive sampling technique. The sample schools consisted of 1 district girl’s schools, 1 district boy’s school, 1 provincial boys and girls school each and district mixed secondary schools. The instruments used were; principals’ interviews schedules, interview schedule for Constituency Bursary Fund Committee (CBFC) and document analysis.
5.2. Summary of Findings

Structures put in place to ensure equitable distribution of the bursary fund according to laid down criteria and procedures by the ministry of education in Migwani district. The study found out that the structures put in place ensured that there was adequate dissemination of information as all the students were well informed on the procedure of application. The study also found out that the bursary funds allocation was done by the CBFC members who vetted the application forms from the students who applied. The CBFC used the information provided by the applicants to determine the neediest cases. Both boys and girls had equal chances of being awarded bursary funds while the orphans and extremely low income families had a higher chance of benefitting from bursary funds. However it was established that the application forms were numerous hence making the process of vetting cumbersome. It was also found out that the procedure of bursary award was interfered with by the political leaders. This meant that some more deserving cases could miss out the bursary allocation. The application process was also hampered by inadequacy of funds. With these shortcomings equitable allocation of bursary funds was elusive.

The number of students who benefited and the number of deserving cases who did not benefit from the bursary allocation across socio-economic groupings.

The study found out that only about a quarter (25%) of students who applied for bursary were successful. This implies that about 75% of the bursary demand was unmet. The respondents affirmed that majority of applicants were needy and deserving and hence they were disappointed by failure to qualify for allocation. Even those students who qualified the still had large fees balances and hence had to be sent home for fees. It was found that most students lost many school days due to fees problems. This means that the inadequacy of bursary funds made it difficult to address equity issues.

Duration Taken to Distribute the Allocated Bursary Funds

The study found that the bursary funds were mainly released in schools during the second and third term. There was mixed response on the duration taken to receive bursary funds
after application. This meant that the allocation of the funds was indefinite and untimely. The study also found out that at times the bursary disbursement was delayed hence unreliable.

**Ways of Improving Bursary Scheme to Enhance Equitable Bursary allocation in secondary schools**

It was widely proposed that the government should allocate increase the budgetary allocation on bursary funds. This is due the inadequacy of current funding. Secondly, it was suggested by principals that politicians like members of parliament and councilors should be excluded in the bursary vetting and allocation in order to reduce their influence which had resulted into some undeserving cases enjoying bursaries at the expense of the extremely needy cases. Thirdly, all the respondents were unanimous that disbursement of bursary funds should be timely in order to reduce delays experienced. Lastly, the CBFC members suggested that more time should be allowed for thoroughly vetting the bursary applications.

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**5.3. Conclusion**

From the findings of this study, the following conclusions were made; There was adequate dissemination of information regarding bursary funds and hence majority of deserving students applied. The structures put in place such as application forms and the CBFC tried to ensure equitable distribution of bursary funds since orphans and extremely needy cases had a higher chance of benefiting from the funds. However, the process of identifying the needy and deserving cases was hindered by nepotism, politics, flawed vetting process and inadequacy of funds. Therefore some needy and deserving cases failed to obtain the bursary funds. Only about a quarter of the applicants succeeded upon application of the bursary funds. Thus three quarters of the bursary demand was unmet. Therefore majority of needy and deserving students did not get bursary funds. Inadequate bursary allocation meant that majority of students lost school days due to fees problems. The bursary fund allocation to
students was also inconsistent in the sense that student could get different amounts in different applications.
The bursary funds also failed to enhance equity in its allocation due to the fact that the disbursement was indefinite and untimely. The delay in disbursement implied that needy and deserving students could be sent home for fees as they waited to see whether they succeeded in the application. Hence the few students from well to do families could continue with learning while the poor were at home.

5.4. Recommendations

Based on the findings, the researcher made the following recommendations;
1. There is need for the government to increase the size of the budgetary allocation if the fund is to have an impact in equitable distribution.
2. There is need for the government to establish a special management structure devoid of political manipulation to run the constituency bursary fund this is because the politicians interfered with bursary allocation hence leading to inequitable distribution.
3. According to the findings of this study, there are delays in the disbursement of the bursary fund. This situation makes the neediest students to miss school. Therefore there should be a mechanism of monitoring the flow of funds from the ministry of finance through the ministry of education to constituencies and finally to schools to ensure timely disbursement of bursary funds.
4. According to the findings of the study, there is need to enhance efficiency and fairness in the management of the bursary fund. The CBFC members appointed should be people of integrity to avoid cases of flawed vetting process. More time should also be allocated for the vetting of application process in order to award the rightful applicants.
5.5.: Recommendations for Further Research

The researcher recommended the following for further research;

1. Given that Migwani District is a low economic potential area with characteristic of arid and semi-arid areas, a similar study should be carried out in higher economic potential with a view of making comparisons.

2. A study should be carried out to determine the extent of political interference with a view of finding possible solutions of eliminating it.
REFERENCES


Mingat & Tan (1985). “*On Equity in Education Again*”.


APPENDIX 1:

LETTER OF INTRODUCTION

Irene Koli Kwoko
P.O Box 1398-00618
Nairobi
January 2011

Dear Respondent,

RE: RESEARCH STUDY

I am a Master of Education student at Kenyatta University presently carrying out a study on the topic "Effectiveness of the bursary fund in enhancing equity in secondary education: A study of secondary education bursary fund (SEBF) in Kitui county, Kenya.

It’s my humble request that you assist me by filling the questionnaire as correctly and honestly as possible. Please be assured that the response from this survey will be treated with utmost confidentiality and be used for academic purposes only.

Thanking you in advance for taking your time to participate in this study

Yours Sincerely,

Irene Koli Kwoko
Researcher
APPENDIX 2

BURSARY FUND EFFECTIVENESS QUESTIONNAIRE FOR STUDENTS.

This questionnaire is designed to gather information about bursary fund for public secondary school students. Kindly respond by 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.

PART ONE

Tick the appropriate response as it applies to you

1. Indicate your age:                                years.

2. Indicate your gender: Male [ ]   Female [ ]

3. Indicate your class

   Form 3 [ ]

   Form 4 [ ]

4. Whom do you live with?

   Both parents [ ]

   One parent [ ]

   Guardian [ ]

   Others (specify) ...................................................................................

5. Occupation of your parents or guardians

   Father                        Mother

   [ ] Businessman               [ ] Business lady
[ ] Employed       [ ] Employed
[ ] Farmer       [ ] Farmer
[ ] Retired       [ ] Retired
[ ] No work       [ ] No work

Other (Specify)……………………Other (specify)………………

6. Indicate your performance last term
   Good [ ]
   Average [ ]
   Poor [ ]

7. How do you like schooling?
   Very much [ ]
   Average [ ]
   Not at all [ ]

PART TWO

8. Have you ever been sent home for lack of school fees?
   [ ] yes     [ ] no

If yes, in 8 above, 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 days

[ ] 1–2 days  [ ] 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  [ ]

Do not affect at all  [ ]

PART THREE

13. Have you ever heard of the school bursary fund?

[ ] yes  [ ] No

14. If yes in (13) above, from whom did you hear about bursary fund?

Head teacher  [ ]

Teachers  [ ]

Parent/Guardian  [ ]

Community/Church leader  [ ]
Others
(specify)........................................................................................................

15. Who do you think would 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. Have you ever applied for bursary fund?

[   ] yes  [   ] No

18. If no, in (17) above, why haven’t you applied?

[   ] I did not know about bursaries
[   ] I did not know how to apply / how the scheme operates
[ ] I never thought I could get the money

[ ] I don’t consider myself deserving a bursary

[ ] I was discouraged by (Indicate who) others (specify)

__________________________________________________________________

__________________________________________________________________

If you have ever applied for bursary, how many times have you applied?

[ ] once  [ ] twice

[ ] thrice  [ ] four times

19. Have you ever received a bursary award?

[ ] Yes  [ ] No

20. If yes in (19) above, how many times have you received bursary funds so far?

[ ] once  [ ] twice

[ ] thrice  [ ] four times

21. If you have received bursary fund, indicate the amount received each time.

1\text{st} \text{ time} \text{ Kshs}  \hspace{2cm} 2\text{nd} \text{ time} \text{ Kshs}

3\text{rd} \text{ time} \text{ Kshs}  \hspace{1.5cm} 4\text{th} \text{ time} \text{ Kshs}

22. Was the bursary money received enough to cater for all your educational needs for the whole year (to pay fees, buy text books etc.)?

[ ] yes  [ ] No

23. Did you have a fee balance after getting the bursary fund?

[ ] yes  [ ] No
24. If yes, in (23) above how did you pay the balance?

[ ] Never paid

[ ] Parent/Guardian paid

[ ] well wisher paid

25. In your opinion who usually gets a greater allocation of the bursary fund. (Tick all that get)

[ ] Orphans

[ ] Boys

Girls

If in mixed school

[ ] Bright students

[ ] Disabled students

Others (specify) .................................................................
APPENDIX 3

BURSARY FUND EFFECTIVENESS INTERVIEW SCHEDULE FOR HEADTEACHERS

1. What procedures are employed in bursary disbursement in your school?

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

3. When is bursary money released to schools?

4. Who decides who should benefit from bursaries?

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

6. Would you say that all needy students/parents are aware of the existence of bursary schemes and how they operate? Please explain your answer.

7. What proportion of students applying for bursaries benefit from the bursary scheme?

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

9. What proportions of students applying for bursaries fail to benefit from the bursary scheme, and for what reasons?

10. How do the students benefiting from the bursary scheme and those failing to benefit compare by gender and income groupings?

11. How has the bursary scheme impacted on equal opportunities in education for all students (equity) in secondary schools in Migwani District?

12. What problems are encountered at the school level, school bursary committee level, and district level in relation to the bursary allocation?
13. In what ways can the bursary allocation systems be strengthened to ensure all needy cases benefit?

14. In your own opinion, how fair are the bursary fund allocation criteria in ensuring equal opportunities in education for all students in secondary schools?
APPENDIX 4

BURSARY FUND EFFECTIVENESS 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 often do you meet as the constituency bursary committee?

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

6. Would you say that all needy students/parents are aware of the existence of bursary schemes and how they operate? Please explain your answer.

7. What proportion of students applying for bursaries benefit from the bursary scheme?

8. To what extent are the funds provided under bursary schemes adequate in enhancing access to education for all students?

9. What percentage of students applying for bursaries fails to benefit from the bursary scheme, and for what reasons?

10. How do the students benefiting from the bursary scheme and those failing to benefit compare by gender and income groupings?

11. How has the bursary scheme impacted on retention of students in secondary schools in Migwani District?

12. What problems are encountered at the school level, constituency bursary committee level, and district level in relation to the bursary allocations?
13. In what ways can the bursary allocation systems be strengthened to ensure all needy students benefit and access education equally as the able students?
## APPENDIX 5

### DOCUMENT ANALYSIS GUIDE

<table>
<thead>
<tr>
<th>YEAR</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of students who applied for bursary.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of students who benefited from bursaries.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total amount of bursary fund allocated to schools.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average amount received per student.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amount of school fees charged per student for the whole year.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Balance (Annual fees charged minus bursary received)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
APPENDIX 6: Work Schedule

<table>
<thead>
<tr>
<th>Phase</th>
<th>Activity</th>
<th>Number of weeks</th>
</tr>
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<tbody>
<tr>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>1</td>
<td>Pilot study</td>
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</tr>
<tr>
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<td></td>
</tr>
<tr>
<td>111</td>
<td>Data collection</td>
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</tr>
<tr>
<td>1V</td>
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