

**EQUITY IMPLICATIONS OF THE SECONDARY EDUCATION BURSARY
FUND: A CASE OF TRANS-NZOIA WEST DISTRICT, KENYA**

BY

MULUMIA J.M. CHRISOSTYM

**A THESIS SUBMITTED IN PARTIAL FULFILMENT OF THE
REQUIREMENTS FOR THE AWARD OF THE MASTER OF PHILOSOPHY
DEGREE IN EDUCATIONAL ADMINISTRATION**

**SCHOOL OF EDUCATION
DEPARTMENT OF EDUCATIONAL MANAGEMENT AND POLICY STUDIES
MOI UNIVERSITY**

JUNE, 2011

DECLARATION**Declaration by the candidate**

This thesis is my original work and has not been submitted for the award of a degree or any other award in any university. No part of it may be produced without the consent of the author and or Moi University.

MULUMIA J. M. CHRISOSTYM
EDU/PGA/12/2006

Date

Declaration by the supervisors

This thesis has been submitted to the School of Education for examination with our approval as university supervisors

Dr. J. N. KINDIKI,
LECTURER,
DEPARTMENT OF EDUCATIONAL
MANAGEMENT AND POLICY STUDIES
MOI UNIVERSITY.

Date

Dr. J. M. BOIT
LECTURER,
DEPARTMENT OF EDUCATIONAL
MANAGEMENT AND POLICY STUDIES
MOI UNIVERSITY.

Date

DEDICATION

To Joan, Sylvia, Sheillah, Paul and Gloria, that you may forever cherish fairness.

ABSTRACT

The Secondary Education Bursary Fund (SEBF) was established in 1994 by a presidential decree to help the socio-economically disadvantaged groups to access secondary education. The purpose of this study was to examine the effectiveness of the SEBF in enhancing equity in access to educational opportunities in Trans-Nzoia West District, Rift Valley Province, Kenya. The study was guided by Rawls' theory of social justice as fairness (1971) upon which the concept of equity is grounded. The study was specifically influenced by the *Difference Principle and the Criterion of Reciprocity* on the basis of reasonable citizenship as espoused by Rawls. The target population for the study was the 2674 students in the 49 secondary schools, school administrators, education officers and opinion leaders in the district. The study adopted a descriptive survey design. Stratified sampling technique was used to select 4 Provincial, 8 District and 5 Private schools. Purposive sampling was used to select the Form 3 students and leaders to be interviewed. Primary data was collected using questionnaires and interviews whose reliability was tested through piloting and validity realized through consultation with subject experts and test developers. Secondary data was derived from document analysis. The findings were analyzed by descriptive statistical techniques such as frequency distribution tables and percentages. The research established that the bursary beneficiaries transcended socio-economic boundaries as the allocation mechanism did not target the vulnerable. As a result, the fund had little impact on equity in access to secondary education. It was concluded that for the scheme to be responsive to the target group, there was need for structural and management adjustments. The findings of the study will inform management decisions geared to revitalizing the fund as well as offering a point of reference for policy review and scholarly debate on issues of education subsidies. The study recommended for the establishment of Management Information Systems and Monitoring and Evaluation structures and called for policy review on the composition and mandate of the CBC to help in targeting and ensuring consistency in bursary awards to the vulnerable groups.

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ABBREVIATIONS

AIDS	Acquired Immuno-Deficiency Syndrome
CBC	Constituency Bursary Committee
CBF	Constituency Bursary Fund
CBFC	Constituency Bursary Fund Committee
CDF	Constituency Development Fund
EFA	Education For All
FPE	Free Primary Education
FSE	Free Day Secondary Education
GDP	Gross Domestic Product
GER	Gross Enrolment Rates
GOK	Government of Kenya
HIV	Human Immunodeficiency Virus
IPAR	Institute of Policy Analysis and Research
IPRSP	Interim Poverty Reduction Strategy Paper
KESSP	Kenya Education Sector Support Programme
KIPPRA	Kenya Institute of Public Policy Analysis and Research
MOE	Ministry of Education
NCEOP	National Committee on Objectives and Policies
NEPAD	New Partnership for African Development
NSFCK	National School Feeding Council of Kenya
PRSP	Poverty Reduction Strategy Paper
SEBF	Secondary Education Bursary Fund
TIQET	Totally Integrated Quality Education and Training
UNDP	United Nations Development Programme
UNICEF	United Nations Children's Fund
WMS	Welfare Monitoring Survey

ACKNOWLEDGEMENTS

The realization of this work was a result of the contribution of people worth mentioning. First, I recognize with appreciation my lecturers in particular, Dr. Too and Mr. Maritim for their comments on my draft proposal. Their suggestions encouraged me to pursue the subject of research. In the words of Dr. Too, “the problem was feasible”.

I salute my supervisors Dr. Jonah Kindiki and Dr. Boit Muguna for their guidance and personal interest in the area of research as well as their generosity in suggesting and offering material for literature review. I am indebted to the staff at the District Education Office, Trans-Nzoia West for availing bursary records and to school administrators for participating and allowing their students to participate in the study.

I cherish the memory of the many friends and colleagues. In particular, Basakwa Wabwile inspired me and generously availed his study material. I recall with nostalgia the cordial interaction enjoyed with Maru, Korir, Hellen, Morias, Ebla, Lawendi and Nanjakululu, which significantly shaped my mind towards the subject of research.

I acknowledge the invaluable technical suggestions made by the MEO Mr. Pius Munialo on the part of language after reading through the draft thesis and more than that for granting me permission on many occasions away from my duties to attend to the study. I also wish to appreciate the commitment with which Mary Mwangi and Esther Aligula displayed in typing the manuscript amidst the bulky office work.

I cannot forget to mention my parents, Makokha and Simuli for denying themselves comfort by investing in my education. You are responsible for this work for it is the outcome of your dreams.

In a very special way, I acknowledge the moral and financial support granted to me by my wife Nakhungu. Her patience, encouragement and understanding in the wake of my absence from home will forever be remembered.

Space may not allow to me mention each and every person. However, I wish thank all those who in one way or another contributed to the accomplishment of this work. May Almighty God bless you abundantly.

CHAPTER ONE

1.0 INTRODUCTION TO THE STUDY

1.1 Introduction

This chapter presents the background to the study, states and defines the research problem and the purpose, gives the justification and significance as well as the limitations of the study, the theoretical framework and operational definitions of terms used in the study.

1.2 Background the Study

Governments all over the world commit significant resources to education. Public subsidy in education has been justified for the enhancement of efficiency and equity (Psacharopoulos and Wood hall, 1985: 139). Nevertheless, it is doubtful as to whether such subsidies reduce the level of disadvantage of the poor. Studies on the distribution of public subsidies across the world have had to conclude that subsidies for education are simply a transfer of income from poor tax payers to the rich.

At independence in 1963, the Kenya government inherited an inequitable system of education based on racial discrimination. The concern for equity, access and social class bias has been, and continue to be a motivating factor in the government's intervention in the education sector. The principle objective has been to realize an education system aimed at removing social injustices and disparities between regions, sexes, social and economic groups and one that equalizes economic opportunities among all citizens. Thus, policy documents since independence have reiterated the importance of education in eliminating social disparities and in equalizing economic opportunities among all citizens.

A review of education policies since independence, suffice to show the government's commitment on equity issues and equality of educational access and participation. For instance, the Ominde Report (GOK, 1965) urged the government to provide equal educational opportunities to all children consistent with the Sessional Paper on African socialism and its application to Planning in Kenya. Similarly, the National Committee on Educational Objectives and Policies (G.O.K.1976) and the Report of the Presidential Working Party on the Second University called for radical restructuring of the education system as a way of addressing access and equality of opportunity concerns. These sentiments were echoed by the Koech Report on Totally Integrated Quality Education and Training (G.O.K.1999) that emphasized the eradication of existing disparities through increased government support. In the Sessional Paper No.1 of 2005 on Policy Framework for Education, Training and Research (G.O.K. 2005), the government notes that policy measures are required to address the access to secondary education by the poor and the disadvantaged groups in order to realize the country's overall educational goals.

As part of the government strategy to ensure equity in access to secondary education, the bursary scheme was introduced in the 1993/1994 financial year. The scheme aimed at increasing access to secondary education, ensuring student retention, promoting transition and completion rates, and reducing disparities and inequalities in the provision of secondary education (IPAR, 2003).

Abagi and Owino (2005) observe that the philosophy behind the bursary scheme was to translate into reality the fact that no child who qualifies for secondary education should be denied access to such education on account of inability to meet school fees. The

scheme targets children from poor households, those from arid and semi-arid areas, children affected by the HIV/AIDS pandemic, orphans, the girl child, and other children under special or difficult circumstances (Nduva, 2004).

Until 2003, the responsibility of identifying bursary beneficiaries rested with the schools' Board of Governors (B.O.G.) a system considered ineffective in targeting the vulnerable. In 2003, the NARC government established the Constituency Bursary Fund (CBF) through an Act of Parliament to administer the disbursement of bursary funds. This was meant to allow the local community to correctly identify needy cases (Kimenyi, 2005). Nevertheless, public debate cast doubt on the ability of the scheme to cushion the poor and the vulnerable from the high cost of secondary education. The contention was that the bursary scheme did not benefit the intended group but instead served to perpetuate social economic inequalities.

A study by Odebero (2002) on bursary allocation in Busia District found the awards inequitable. The study established that students from high socio-economic backgrounds received more bursary support than those from humble backgrounds. These findings echoed observations by Odalo (2000) who faulted DEB disbursements for perpetuating inequality by giving bursaries to undeserving students. Similarly, King (2005) observes that the bursary scheme in Kenya seem to favour a significant number in the top income class.

A study by Abagi and Owino (2005) reveals that the current bursary scheme is characterized by inefficiencies, ineffectiveness and lack of accountability and transparency. They recommended for a study on the administration, operations and impact of bursary on the target group.

It is worth pointing out that amidst this debate, the Economic Surveys (2004, 2005) indicate that over 50% of the country's population lives below poverty line. Similarly, a report by the African Peer Review of Nepad indicates that 57 percent of the populace in five provinces in Kenya lives below poverty line. Abagi (2006) attributes the low rate of participation at secondary education in Kenya to the cost burden on parents amidst poor economic growth and increased levels of poverty. It has also been argued, on the basis of the 1999 census data, (G.O.K 2006) that a total of 2.8 million boys and girls aged between 14 and 17 years who should have been in secondary are not enrolled. If education is to provide avenue for social mobility as argued by Psacharopoulos & Woodhall (1985) and Patrinos (2001), then the several millions of children that miss this opportunity and their generation would perpetually live in poverty.

The government guidelines which define bursary awards on the basis of the school category apparently perpetuate inequalities in educational access. Bogonko and Otiende (1988) observe that categorization of schools points towards class hierarchies which often determine access to certain schools by the students. In this way, inequality is preserved and perpetuated. This inequity is further heightened by the fact that the bursary facility serves only those already enrolled in secondary schools. In effect, bright children from poor families who forfeit their chances in provincial schools and enroll in district schools get the least bursary support. Certainly, the plight of these poor children for whom bursary was established, made this study imperative.

1.3 Statement of the Problem

The overall concern of the study was to establish the extent to which the fund enhanced equity in access to secondary education. Since its establishment, the fund had grown

yearly and attempts made to vary the allocation mechanisms to make it responsive to the target group. The shift in the management of bursary funds from the BOG to the CBF initially hailed as the best move soon received condemnation and public outcry. Complaints abound with regard to the failure of the scheme to target the needy. The general public feeling was that needy cases missed out on the bursary kitty while those from the well off families benefited. There was doubt on the capacity of the scheme to realize equality in educational opportunities necessary to narrow the gap between the socio-economic groups (IPAR, 2006). In view of this, a study was conceived with a focus on Trans-Nzoia West District to establish the extent to which the bursary facility enhanced equitable access to secondary education. The study sought to analyze the socio-economic composition of the beneficiaries and effectiveness of the allocation mechanisms in targeting the vulnerable and the impact thereof.

Like many other districts in Kenya, Trans-Nzoia West is characterized by extreme socio-economic inequalities. The district is inhabited by extremely rich people ranging from estate owners to businessmen on one hand, and the landless poor on the other hand. Access to secondary education is largely influenced by these socio-economic inequalities. In addition, the district has over 26 District schools, most of which were poorly equipped due to inability of parents to pay fees. Reported cases of misallocation of bursary funds, the delay in disbursement, and conflicts between the MP and the CDF committee culminating into legal tussles, seemed to impact negatively on access to secondary education by the poor (Namlola, 2006). This scenario raised the question of equity in access to quality education and formed the basis of the study.

The underpinning assumption of the study was that children from high income groups who were disproportionately represented in provincial schools accessed the bursary facility at the expense of the poor and the vulnerable that were a majority in the poorly funded District Schools. The alleged exclusion of the poor for whom the fund was established meant that they were denied access to higher education and had consequently slim chances of upward social and economic mobility. The study sought to determine the apparent inequity in bursary distribution which left unchecked, would result in perpetuating the historical socio-economic inequalities - situation bound to jeopardize social stability.

1.4 The Purpose of the Study.

The purpose of the study was to examine the bursary allocation mechanism with special focus on equity considerations according to socio-economic backgrounds of the recipients, disbursement procedures, and its impact on equity in access to secondary education with regard to the poor and the vulnerable groups.

1.4.1 The Specific Objectives of the Study.

- (i) To establish the socio-economic backgrounds of the bursary beneficiaries.
- (ii) To determine the effectiveness of the bursary allocation mechanism in targeting the vulnerable students.
- (iii) To assess the impact of the bursary scheme on equity in access to secondary education.

1.5 Research Questions

The study was guided by the following research questions

1.5.1 Major Research Question

Is there any relationship between the Secondary School Bursary Fund and the access to secondary education opportunities by the poor and the vulnerable?

1.5.2 Subsidiary Questions

- (i) Who are the beneficiaries of bursary by socio-economic background?
- (ii) How effective is the bursary allocation mechanism in targeting the vulnerable students?
- (iii) What is the impact of the bursary scheme on equity in access to secondary education?

1.6 Justification of the Study

The gross enrolment rates (GER) for secondary school education in Kenya by December 2005, stood at 30 percent (Francis & Nyamongo, 2005: 9). The declining enrolment since 1990s was attributed to a reverse of the rural economy, making the cost of secondary education high, relative to incomes (UNDP 2005, Economic Surveys 2004; 2005). Thus, the prevailing poverty situation in the country limits parental investment in secondary education.

Previous studies on the performance of the bursary faulted the allocation mechanisms then under head teachers. The shift in the management of the funds to the Constituency Bursary Committee (CBC), meant to streamline the allocation, has instead evoked public outcry. Abagi and Owino (2001) calls for serious studies on the administration, operation, and impact of the bursary fund on the target group and an analysis of the composition of the bursary beneficiaries by socio-economic backgrounds. Media reports and scholarly debates (King, 2005; Patrinos, 1999) on alleged corruption and misallocation of the merit-based education bursary fund, suggested a disabling environment for the scheme.

Patrinos (2001) observes that while targeted bursaries have the potential of improving access, equity and educational quality, they on the other hand have the high risk of missing the target population. Thus, in recognition of the challenges of ensuring equity in education and the magnitude of change required to address the challenges, there is need for comprehensive, concerted and continuing strategies that engage society in this commitment. Rawls (1971) argues that there is no system that can be called efficient if there is an alternative arrangement that improves the situation of some people with no worsening of the situation of any of the other people. This research therefore, sought to examine the performance of the targeted bursary support at the poor and the needy and to explore strategies geared to enhance its performance. The findings will inform decisions aimed at enhancing the scheme's ability to meet the needs of the disadvantaged and thereby reducing inequality in education provision, and by extension, socio-economic inequalities.

1.7 Significance of the Study

The study findings are expected to inform policy on the current loopholes in the bursary allocation mechanism with a view to exploring strategies to realize equitable access to secondary education. In addition, the study findings will shade light on structural and management aspects that that need adjustment for effective administration of the funds. Further, the findings will trigger investigation in other 'safety nets' for the poor as well as in other devolved funds to assess their effectiveness on the target groups. Finally, the study is expected to contribute to knowledge that will provide a basis for reflection on education subsidies by scholars in education management.

1.8 Assumptions of the Study

The study was based on four assumptions that:

- (i) Schools had data banks for the vulnerable.
- (ii) Bursary disbursement records would be accessible.
- (iii) The information obtained would be adequate and reliable.
- (iv) The findings would be generalized to the entire district and will inform decisions to realize equity in education access.

1.9 The Scope of the Study.

The study was confined in Trans-Nzoia West District and limited to seventeen secondary schools. It focused on SEBF as a component of the CBF. The researcher avoided the CDF 10% bursary component whose allocation transcends secondary education. The researcher examined the fund's performance since 2003. The year 2003 was chosen because it marked the changes in the bursary management structures. This was the year when constituency Bursary Fund Committees were established to co-ordinate the activities of the scheme. Ideally, the survey would have been carried out across the country but due to time and resource limitations it was confined to Trans-Nzoia West District.

Literature on bursary fund in Kenya is not well documented and lacks details that would enable meaningful analysis. Thus, the researcher reviewed literature on previous related studies and media reports. The researcher also reviewed literature on education financing with special reference to education subsidies in selected countries across the world for comparative purposes.

The findings of the study may or may not apply to other Districts in the country. This is because of the socio-economic differences and the differences in the prevailing political input in the management of the bursary scheme.

1.10 Limitations of the Study

The researcher experienced the following limitations:

- 1) There was suspicion from school administrators and consequently a number of them especially from private schools could avail the necessary documents.
- 2) The information provided by the CDF office was inadequate.
- 3) Scanty literature on bursary scheme in Kenya

1.11 Theoretical Framework

The study was guided by Rawls' theory of social justice as fairness (Rawls, 1971) upon which the concept of equity is grounded. The theory provides a framework that explains the significance, in a society assumed to consist of free and equal persons, of political and personal liberties, of equal opportunity, and cooperative arrangements that benefit the more and less advantaged members of society. Rawls argues that all social primary goods are to be distributed equally unless an unequal distribution is to the advantage of the least favoured.

According to Psacharopoulos and Woodhall (1986) equity objective seeks to ensure justice or fairness in the distribution or sharing of resources among individuals or groups. This argument explains the position of equity objective as applied in this study, which desired to investigate fairness in the distribution of educational subsidies. According to

Rawls (1972: 15) equity of distribution is a conception of justice that nullifies the accidents of natural endowments and the contingencies of social circumstances.

The study specifically adopted the *Difference Principle* and the *Criterion of reciprocity on the basis of reasonable citizenship* as espoused in Rawls' theory of social justice.

With regard to the Difference Principle, Rawls (1971; 76) maintains that socio-economic inequalities must be to the greatest benefit of the least advantaged members of society.

Accordingly, the Difference Principle reckons socialist and ethical issues which advocate first, that responsibilities or burdens should be distributed according to ability and benefits according to need, hence the bursary awards needed to go to the deserving cases.

Secondly, the use of special skills should be rewarded. In the case of this study, bright and needy students should be supported by society to realize their potentials.

The Difference Principle abhors a change in social and economic institutions that makes life better for those who are already well but does nothing for those already disadvantaged, or makes their lives worse. The implication is that first, society may undertake projects that will make life better off for the people who are worse off by empowering the least advantaged persons to the extent consistent with their well being to enable them access education. Secondly, that access to secondary education should not be blocked by discrimination according to irrelevant criteria such as political influence. Lastly, a system that allows the well off to benefit from funds set aside by society for the disadvantaged is in effect unjust. It is in this light that Nussbaum (2000) calls for commitment by citizens and governments to a threshold of real opportunities below which no human being should fall if he is able to rise above it.

In advancing the *criterion of reciprocity on the basis of reasonable citizenship*, Rawls (1996:49) maintains that citizens are reasonable when viewing one another as free and equal in a system of co-operation over generations. They are prepared to offer one another fair terms even at the cost of their own interests in particular situations provided that others also accept those terms. They must do this as free and equal and not as dominated or manipulated, or under pressure of an inferior political or social position (Rawls, 1996: 54). This principle guided the researchers' reflection on the degree of independence in decision-making by CBC members with regard to bursary allocation among the socio-economic groups.

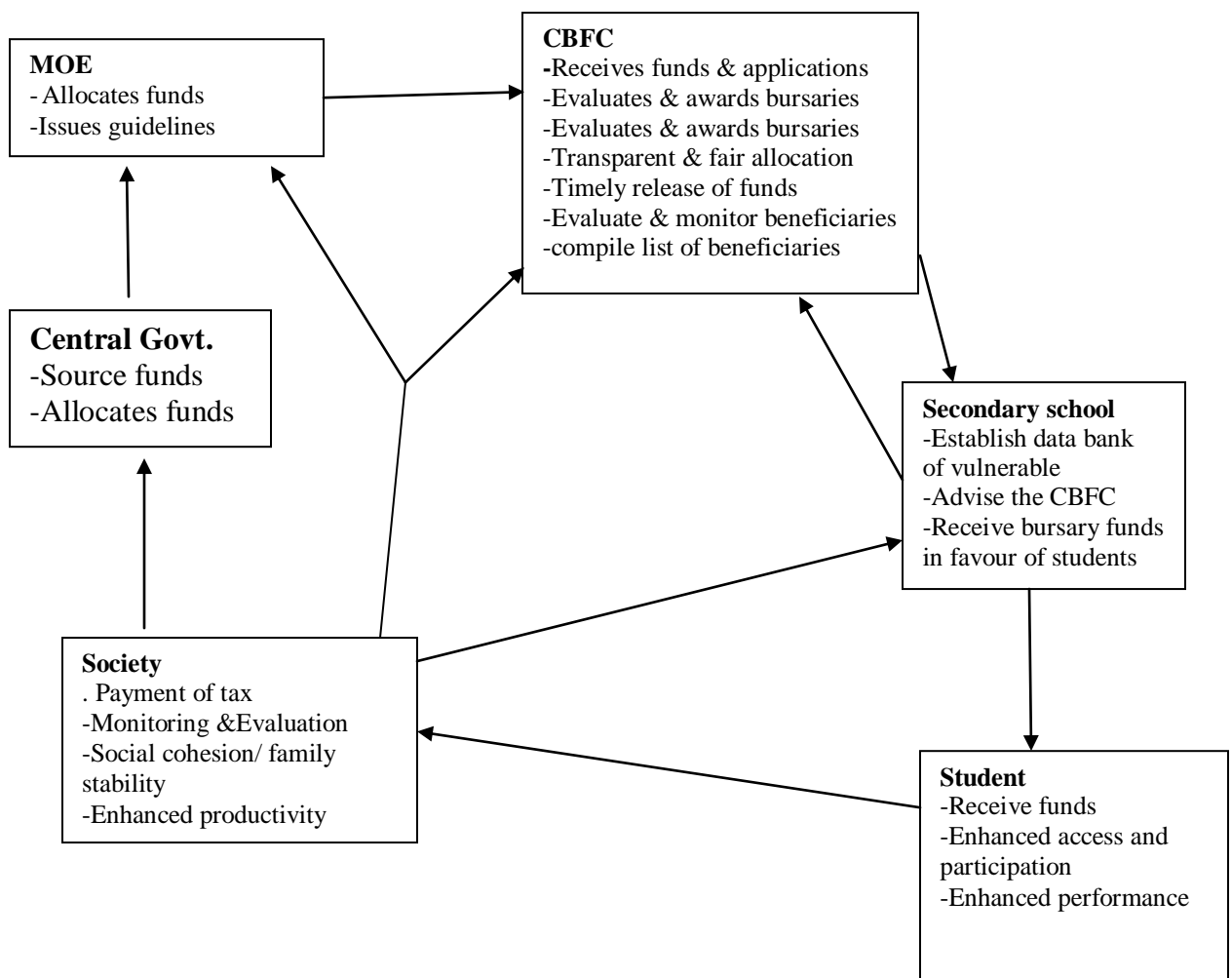
The second aspect of being reasonable is by recognizing and being willing to bear the consequences of the burdens of judgment (Rawls, 1996: 58). Reasonable persons affirm only reasonable comprehensive doctrines and acknowledge the fact that the burdens of judgment set limit on what can be reasonably justified. This principle guided the researcher's investigation with regard to the accountability and transparency with which the funds were allocated.

The adoption of this theory was in the opinion of the researcher, in harmony with the concepts of equity and equality in relation to education provision. The researcher held the view that first, those charged with the responsibility of appropriating bursary funds are guided by the Difference Principle to realize equity in educational opportunities to prevent inequalities in perpetuity. Secondly, that persons entrusted with this task were reasonable citizens, responsible for their actions, independent in judgment, and fair in their dealings, with little manipulation to deviate from the bursary eligibility criteria. Thirdly, that being reasonable citizens, they were transparent, accountable, and upheld the tenets of social justice.

1.12 Conceptual Framework

Fig 1.1 below describes an ideal situation of the flow of bursary resources from society to the government, then to the CBFC and then to students. It also shows interactions among different groups for information sharing to realize an effective allocation system.

Fig 1.1 A Conceptual Representation of an Effective Equitable Bursary Allocation Mechanism



1.13 Definition of Terms Used in the Study.

Bursary - Financial assistance scheme for students from poor families and or disadvantaged backgrounds.

Equality - Provision of educational opportunities devoid of differences and disparity in educational participation and achievement between children of different socio-economic backgrounds.

Equity – Fairness and impartiality in the distribution of education subsidies to learners in consideration of their socio-economic backgrounds.

Implications – The consequences, results or outcomes of the bursary scheme on the targeted group.

Poor – Those unable to financially meet the costs associated with education.

Social justice – A concept based on the belief that each individual within a given society has a right to equal opportunity and full participation in education.

Voucher – A payment that a public identity gives directly to students to use at the school of their choice.

Vulnerable – Those students that may miss an opportunity to access school or who are likely to drop out due to socio-economic hardships.

1.14 Conclusion

This chapter reflected upon attempts made and challenges experienced in realizing equitable secondary education Kenya and defined the problem of study. In the context of this study, and in relation to the theoretical framework, benefits associated with access to education opportunities should accrue to all without arbitrary discrimination. Equity of such a distribution can be achieved when the disadvantages of the poor and the vulnerable groups are nullified. It was within this framework that the study concerned itself with the distribution of the Secondary Education Bursary Fund to assess the extent to which the inherent inequities were being compensated for or nullified to achieve equitable opportunities of access to secondary education.

CHAPTER TWO

LITERATURE REVIEW

2.0 Introduction

This chapter reviews literature on education financing in the context of equity concerns.

It examines education subsidies from an international perspective meant to address equity in access to educational opportunities and the challenges experienced. Finally, it reflects on government policies geared to enhancing equity and in particular, the operations of the Secondary Education Bursary Scheme in Kenya.

2.1 Education as an Investment

Governments around the world recognize the importance of education for economic and social development and thus, invest large shares of their budget in education. However, education provision has not reached all members of society equally. Girls, indigenous people, tribal groups, disadvantaged minorities, and the poor are often left out. Furthermore, the needs of children with learning disabilities, children with physiological problems and children without homes have not been met (Patrinos 1999:3). Government investment in education is augmented by society's efforts. Society investment in education includes meeting costs associated with providing school services in addition to the foregone earnings, and meeting various charges by the individuals receiving education.

Public investment in education has been justified on several counts. According to Patrinos (1999) it can reduce inequality, open opportunities for the poor and the disadvantaged, compensate for market failures in lending for education and make transformation about the benefits of education more generally available.

Scholars like Schultz (1961), Denison (1962), Blaug (1967), and Psacharopoulos (1975) among others, underscore the important role of education in individual improvement and national development. Indeed, education is viewed as an input in the development process through the human capital it generates. The World Bank (2002), McMahon (1999), Carnoy (1995) and Psacharopoulos and Woodhall (1985) explain the relationship between education, economic growth and other forms of individual and national development. It is argued that the average years of secondary and higher education are significantly related to subsequent economic growth across a section of countries. The World Bank (1999) underscores the role of education in socio-economic growth pointing out that education influences productivity and earnings, improves the health and nutrition status of the people, directly enriches lives and strengthens social cohesion, and gives more people better opportunities and thus equity through opportunity.

It is worth noting that the relationship between education and economic growth greatly influenced the post – independence educational policy directions for most African states. Yet it must be observed, that even with the perception of high benefits associated with education, poor families lack the income necessary to meet the associated costs. Consequently, the lower income groups do not enroll, send only a son among many children to school (Patrinos, 1999), or withdraw their children altogether from school when the financial burden becomes great. This widens the inherent socio-economic gap in society.

2.2 The Concept of Equity in Education

As a social service, education has not spread evenly. Its distribution is characterized by inequalities in terms of access, achievement and transition. Efforts to expand education

opportunities as crafted neatly in education policies have not democratized education opportunities but have instead preserved and perpetuated inequalities. This has necessitated pressure to give priority to equity objectives whose ultimate goal is to enhance social justice (UNESCO, 1982).

Equity refers to the distribution or sharing of resources among individuals guided by the notion of justice (Patrinos, 2001). Determination of equity is based on facts about how resources are distributed, and on normative judgments about how society should distribute resources. This necessitates the classification of society into mutually exclusive groups: sex, social class, income level, and occupation. According to Boit (2007), equity in the context of education, involves equality of opportunity of access and participation of various groups in education. Similarly, Psacharopoulos and Woodhall (1975:246) argue that equity goes beyond equality and considers fairness and justice in the distribution of education resources.

McMahon (1982) in Psacharopoulos and Woodhall (1985:249) identifies three types of equity: horizontal equity which refers to the equal treatment of unequals, vertical equity which refers to unequal treatment of unequals (and which raises the question of how equality and inequality is to be judged) and intergenerational equity which is concerned with ensuring that inequalities in one generation are not simply perpetuated.

Nevertheless, evidence from developing countries indicates that some groups have better access to educational opportunities than others and that factors determining access vary among countries. Public spending on education is considered inequitable when qualified potential students are unable to enroll in institutions because of lack of opportunities or inability to pay. A few examples suffice to explain the extent of disparities in education

provision across the world. In Malaysia, disparities exist between males and females and between geographical regions as well as between people of Malay and Chinese origins. In Sri-Lanka, ethnic and religious differences play a role in educational attainment, while in Peru, language is a determinant. Income level influences educational disparities in Colombia, Malaysia and most of the African states (Patrinos, 1999).

According to the Human Development Report (2003:92), of the 680 million children of primary school age, 115 million do not attend school, three fifths of them being girls. In addition, just over half of those who start primary school complete, and in the Sub-Saharan Africa only about a third. The report also reveals that a quarter of adults in the developing world are illiterate and that of the World's 879 million illiterate adults, two thirds were women.

A study by Akinkugbe and Kunene (2001) in Swaziland concluded that the distribution of public spending on education is not equitable among different levels of education. Similarly, Salmond (2004) highlights educational inequities in the New Zealand as strongly linked with income and ethnicity, which influences the sharply disparate patterns of educational achievement.

In emphasizing the need for equitable access to education, the Education Sector Policy Paper (World Bank 1980:2a) warns that the last five to ten percent of students remaining to be enrolled will be the most difficult to serve and will probably require special measures. It is argued that the distribution of education opportunities may be used as a tool to re-distribute income. This means that investment and services should not be concentrated on a few favored places and social groups. Rather, educational investment

should be used consciously to re-distribute incomes to the poor (Psacharopoulos & Woodhall, 1985).

The role of education in reducing inequalities of income is well captured by the development of the human capital theory in 1960s that engendered considerable optimism about the effects of educational investment. Economists argued that educational investment was a powerful long-term method of equalizing earning and income (Psacharopoulos & Woodhall, 1985). The general conclusion on studies in the relationship between education and income distribution and the re-distribution impact of educational investment and government subsidies in developing countries indicate that education may raise the overall level of income and thus reduce the absolute level of poverty, may change the dispersion of income, and open up new opportunities for the children of the poor and thus act as a vehicle for social mobility.

If on the other hand participation is confined to the children of the rich, education may simply transmit inter-generational inequality. Similarly, if certain groups for example, male, urban, ethnic groups obtain higher financial rewards from their education than other groups such as females, rural inhabitants and ethnic minorities, then education may increase income inequalities (Psacharopoulos & Woodhall, 1985). In the context of this study, if bursary funds benefits the well off in society, then the prevailing social inequalities will persist.

Studies also conclude that the pattern of financing and in particular, the extent of public subsidies for education may re-distribute income from those who are taxed to those who benefit from subsidies and that education may interact with fertility, mortality, health and other aspects of development that affect income distribution (Psacharopoulos &

Woodhall, 1985). Since the benefits of education are greater for some groups than others, the way in which education opportunities are distributed in society will affect future income distribution. This calls for policies committed to reduce educational inequalities in opportunity of access. This is particularly crucial in developing countries where inequalities in educational opportunities are severe. It is equally important to ensure that the pattern of financing education does not have an undesirable impact on income distribution.

2.3 Equity Issues Regarding General Educational Subsidies

In the context of equity considerations, educational investments need to be evaluated on the basis of the following two criteria (McMahon, 1982): the distribution of educational opportunities and facilities between different social groups, geographical areas or rural and urban population and the distribution of financial burdens and benefits of education.

Empirical evidence suggests that the rapid expansion of education investment in developing countries in the 1960s and 1970s tended to benefit higher income families and urban rather than rural communities. This widened rather than reduced disparities. Psacharopoulos and Woodhall (1985) caution that if education investment is to contribute effectively in achieving equity, the choice of project must be based on a careful assessment of the reasons underlying inequalities of access or opportunities.

It is yet to be established as to whether public subsidies for education re-distribute income from the poor to the rich or from the rich to the poor (Psacharopoulos and Woodhall, 1985). Evidence from a number of developing countries however, suggests that the present pattern of subsidies often favors the rich (Blaug, 1982; Fields, 1980). Mingat and Tan (1985) argue that equity in the distribution of public resources depends

on the pattern of subsidization by level of education as well as socio-economic composition of the student population at each level. Their study of major world regions reveals that in developing countries, the distribution of public resources among members of a given generation of school age children is strikingly inequitable.

Inequalities of access or participation mean that the benefits of education are disproportionately enjoyed by upper income families whose children are far more likely to complete secondary schooling or enroll in higher education. Moreover, education increases the earning capacity and thus the lifetime of the educated. Hence those who benefit from educational subsidies are likely to have higher than average incomes in future. This will perpetuate the current inequalities.

Psacharopoulos and Woodhall (1985) argue that public subsidies of education seem to involve the transfer of income from poor taxpayers to the children of the rich or to those who may become rich as a result of their education. This is because subsidies are financed by and large from general taxation. While acknowledging the complexity of equity implications of educational subsidies, it is imperative to define what is meant by equitable distribution of financial burdens and benefits of education on the basis of the equity criteria of equal opportunity, payment by those who benefit, and the ability to pay.

In his analysis of higher education system in Kenya, Fields (1975) first concludes that: If the government's aim is to ensure equality of opportunity, the system is inequitable since the lowest income group constitutes ninety percent of all the taxpayers but provides only sixty to seventy five percent of student in higher education whereas the richest one percent of the tax payers provides six to ten percent. Secondly, he maintains that the fact that all students are subsidized regardless of income flouts the principle "*He who benefits*

should pay". Lastly and with regard to the third criterion- ability to pay, which takes into account unequal incomes and requires those with the greatest ability to make the greatest contribution to costs, he concludes this is not the case in Kenya. Indeed even the envisaged government strategy to waive tuition fees at secondary school flouts this principle.

A similar study by Armitage and Sabot (1984) of secondary education subsidies concludes that the least needy are the ones most likely to obtain subsidies. They argue that students from higher income families should pay a higher proportion of the costs of their education and thus, free resources for subsidies for the less fortunate, suffering the greatest inequalities. Fees for those who can afford to pay and selective subsidies for the poor would have positive effects of income distribution in many developing countries. Selective scholarships based on both ability and financial needs are one way of targeting subsidies for the poor. Income related-fee is another method that has been tried in Colombia (Psacharopoulos & Woodhall, 1985).

2.4 Demand – Side Financing: Targeted Subsidies

Patrinos (1999) argue that if education was provided under market conditions, only those who could afford to pay tuition fees could enroll. Not only would there be under investment from the social point of view, but income inequalities would be preserved from one generation to the next since education is a determinant of lifetime income. This calls for mechanisms to determine equitable allocation of educational resources amongst individuals of differing abilities. In order to achieve an input allocation that is not regressive, there is need for input progressivity. More resources should be devoted to the education of those with less ability than those from well off families.

Debate about equity implications of education subsidies depends on whether a populist or elitist (meritocratic) view of equity is adopted. The former would distribute educational opportunities equally among members of society; whereas the latter would base the distribution on ability and thus would be said to promote equal treatment of unequals.

Johnes (1993) observes that the conventional allocation of resources in education, where the greatest part of expenditure is devoted to the schooling of those with most innate ability, clearly produces an inequitable outcome. This argument is shared by Briggs and Ayot (1988) who contend that educational subsidies are disadvantageous to the poor since measures of ability tend to correlate with the socio-economic background. Hence, using ability to allocate education opportunities does not bring about equality of opportunity of any kind. Ideally, students should be subsidized according to their wealth to cover all or most of the cost of education.

Demand-side financing mechanisms can be used to help poor families to invest in education. This can be accomplished by reducing official tuition charged and by attempts to compensate the poor families for these charges, as is the case in Bangladesh, Pakistan and Guatemala. The use of demand-side financing mechanism such as vouchers, stipends and capitation grants does not necessarily imply less public finance but that the money is targeted to the needy. The use of these mechanisms in education is common in member countries of the Organization for Economic Co-operation and Development (OECD) and in developing nations. Such funding mechanisms need to be explored in the local context to help target the vulnerable.

Part of the conceptual framework of demand-side financing in education is the issue of choice. The focus is on the individual (or parents in the case of basic education). Calls for parental choice are usually directly related to efforts to improve educational outcomes. It is argued that school choice is promoted as a means of increasing competition in the school system (Fieldman, 1997). It is believed that competition will lead to efficiency gains as schools compete for students and try to improve their quality, while reducing expenses (Patrinos 1999). In justifying the issue of choice, Patrinos (1999) quotes J.S. Mill:

If the government would make up its mind to require every child a good education, it might save itself the trouble of providing one. It might leave to parents to obtain the education where and how they pleased, and content itself with helping the school fees of the poorer classes of children and defraying the entire school expenses of those who have no one else to pay for them.

There are several examples of targeted subsidy schemes in the developing world. A full-blown voucher scheme exists in Chile, while targeted bursary schemes are in countries like Columbia and Kenya. Other developing countries like the Dominican Republic and Senegal provide subsidies to private schools that take in students from poor families (Patrinos & Ariasingam, 1997).

An examination of the performance of education subsidies across the world is illuminating. In Australia, all private schools receive some form of government support, but the poorest receive more aid. In Hungary, private institutions formally authorized by municipal authorities are entitled to receive the same amount of pupil grant as local municipalities do. In Chile, individual grants based on the number of students attending class each month are given to each municipality. The success of the voucher system in

Chile is however attributed to severe penalties associated with misappropriation of government funds (Winkler and Rounds, 1993).

The Voucher scheme in Colombia targets the poor. Only those students completing the fifth grade can apply and the voucher is renewable yearly up to the eleventh grade. Private schools elected to participate in the programme are those who serve the poor families. In New Zealand, a targeted voucher scheme was introduced in 1995 for poor children to attend private schools. Known as the Targeted Individuals Entitlement (TIE) Scheme, it serves low-income children (Patrinos, 2001).

According to La Rocque & Vawda (2000), municipalities in Sweden provide capitation grants to each private school equal to eighty percent of the cost of educating pupils in the local public system. The subsidy enables nearly 90 percent of private schools to be free from charging fees. Both public and private schools are government funded on an equal basis in the Netherlands. In Cote d' Ivoire, the government sponsors students to attend private institutions, while in Senegal, scholarships are offered to students in both public and private institutions. The Gambia has a scholarship scheme for girls at the upper basic and secondary levels while in Mexico, a policy known as *oportunicades* provides cash transfers to the poor households for education (Owiro, 2006).

Experience from the above comparative analysis can help in designing equity strategies appropriate to our local environment. If the poor have to be helped to invest more in education for better returns, there is an urgent need to reflect on policy with regard to educational bursaries for the underprivileged. This was the motivation behind this study

2.5 Policy towards Equity in Education: Kenyan Perspective

Education policies geared to enhancing equity in the provision of educational opportunities are largely influenced by international covenants. Article 26 of the 1948 UN Declaration of Human Rights (UN, 1973:3) states:

Everyone has a right to education. Education shall be free, at least in the elementary and fundamental stages.

Similarly, Article 13 of the 1966 International Covenant on Economic, Social and Cultural Rights (UN, 1973:5) states:

Secondary education in its different forms...shall be made generally available and accessible to all by every appropriate means and in particular by the progressive introduction of free education.

These commitments are based chiefly on arguments that education is a critical component in personal fulfilment and individual and group social mobility. It is thus deemed unfair that individuals can be denied access to education simply because their families are unable to pay fees. Bray and Lillis (1988:56) argue that fee charges may keep talented individuals out of school and thus waste national resources.

The Human Development Report (2003) observes that in most countries, the poorest 20% of the population receives less than 20% of public spending on education as richest 20% receives considerably more than 20%. The only exceptions are evident in Colombia, Costa Rica and Chile where a large share of public spending goes to the poorest 20%. The report calls for policies to redress these inequities. Psacharopoulos and Woodhall (1985) call for efforts to increase the quality as well as the quantity of educational provision for the poor, for the rural communities, for vulnerable families, and for all under-represented in education.

At independence in 1963 Kenya inherited an education system with gross inequalities based on racial, social and religious grounds (Boit, 1998). The Kenya Government has demonstrated its commitment to addressing the issue of equity in access to education opportunities since independence. This is demonstrated in the various policy documents aimed at realizing an education system free from social injustices and disparities between regions, sexes, social and economic groups and one that equalizes economic opportunities among all citizens.

Kenya's national philosophy is grounded on the universal principles of political equality; national unity; human dignity; freedom of religion and conscience; social justice; freedom from want, ignorance and disease; equal opportunities for all citizens; equitable distribution of national income and the promotion and preservation of cultural heritage (GOK, 1996). These are the pillars upon which the country's education objectives are anchored.

Boit (2007) observes that equity issues and equality of educational access and participation consideration have been the overriding objectives of Kenya's educational reforms since independence. Efforts to address equity, access and social class disparities can be traced to the first Education Commission of Inquiry in 1963. The Commission (Ominde Report, 1964) endorsed the call to expand secondary and post-secondary education. These recommendations are consistent with government policy on education, spelt out in the Sessional Paper No.10 of 1965 on African Socialism and its Application to Planning in Kenya (GOK, 1965).

Similarly, the National Committee on Educational Objectives and Policies (NCEOP) (GOK, 1976) and the Report on the Presidential Working Party on the Second University in Kenya (GOK, 1982), recommended radical restructuring of the education system as a way of addressing equity, access and equality of opportunity concerns. This was echoed by the Koech Report (GOK, 1999) which recommended education for all, with emphasis on the eradication of existing disparities. The report urged the government to increase support in the provision of education by creating and strengthening new partners to enhance equity and access, and reduce social inequalities in education.

To address the challenges of equity and participation, the crucial role of bursaries is reiterated by the Interim Poverty Reduction Paper 2000-2003 (GOK, 2000). In recognition of the role of education in reducing intergenerational inequity and to ensure that inequalities are not transferred from one generation to the next in perpetuity, the government (GOK, 2005) committed itself to address the challenges of equity, access and equality of opportunity to meet the challenges of the 21st century.

Despite these policy commitments, education provision in Kenya is characterized by glaring inequalities. Psacharopoulos and Woodhall (1985), submit that the political power of the middle and upper class group and elites and their determination to retain economic and educational privilege are motivating factors in the provision of education. Indeed, many of the suggestions of improving equality of educational investment are usurped by elites for their personal gain. While it is desirable to decentralize functions and resources to local communities, there is need as argued by Serageldin (1995), to strengthen accountability of local leaders to ensure prudent appropriation of bursary funds.

The National Education Philosophy calls for a sense of unity in a diverse society. This requires habits of mutual respect and appreciation and a pride in a shared heritage. Consequently, the high rate of education inequality suggests that social mobility for those currently at the bottom of the heap is an urgent priority in the interest of all Kenyans. This may require significant shifts in the current patterns of education subsidies. In contemporary economics where knowledge and wealth go together, social mobility cannot be achieved unless young people from all walks of life have the opportunity to fulfill their potential and gain the high levels of skills and adaptive learning that will be rewarded in a changing workplace. This is the most urgent challenge currently facing the education system in Kenya.

2.6 Equity Challenges in Financing Secondary Education in Kenya

The pattern of financing secondary education in Kenya involves both the government and private players. The government commitment in the provision of education is reflected in the educational policies and in the consistent resource allocations and expenditure since independence.

Abagi (2006) observes that on average, the government financing of secondary education is at forty percent while household funding constitute about sixty percent. The government financing of education covers administrative costs, management and supervision, infrastructural development, curriculum development, training of teachers, and teacher's remuneration, bursary, scholarships and tuition. On the other hand, households are responsible for the provision and maintenance of school facilities and learning materials, transport and communication, catering and accommodation costs,

school amenities like water and energy, salaries for the non-teaching staff, games and special education trips.

Government fees guidelines for secondary schools in a circular dated 20th November 2002 set the fees ceiling in three categories as: National – Kshs.26900, Provincial Ksh.20, 900 and Day schools as Ksh.8, 000. These guidelines were meant to rationalize fees charged in schools amidst prevalent poverty and to stem high dropout rates. It is worth noting however, that this objective is terminally defeated as head teachers defy the guidelines arguing that they are unworkable given the continued rise in the costs of living amidst high inflationary rates. Against these guidelines the CBF has had to allocate as little as Ksh. 2000 as bursary posing questions of efficacy and efficiency.

Both the government and households have faced major challenges in meeting their costs towards secondary education. This has been attributed to the poor economic growth, high levels of poverty, corruption and mismanagement. The impact has been limited expansion of secondary education thus restricted access, high school dropouts, dilapidated facilities in most public schools, poor quality of teaching and learning and poor performance in national examinations among others.

While it is noted that overall, the proportion of education's share of GDP for Kenya is higher than the Sub-Saharan average, the high levels of allocation have not been matched by efficiency and effectiveness gains meaning that investment in this sector is not optimal (Owino & Abagi, 2006). Kosgey et al (2006) observe that in spite of the increasing trend in budgetary allocation to the education sector, the government is faced with challenges in increasing access, equity and efficiency in the provision of education.

Findings of studies on education costs, financing and cost-sharing in Kenya, generally associate increased cost of education to low standards in education, decline in enrolment, rise in dropout rates, a gradual erosion of parental ability to provide for essential needs of the family, an overall lowering of the quality of education as well as low transition rates from primary to secondary education (Owino & Abagi, 2006; Mukui, 2006). This situation makes the poor betting on education as a way out of poverty, a shaky proposition. This calls for efficient and effective management of funds set aside as a 'safety net' for the vulnerable.

According to Abagi (2006), the crisis in secondary education is attributed to the absence of knowledge about the ideal unit cost of secondary education. As a result, the government and communities fail to invest in secondary education in a comprehensive and sustainable manner. In effect, students from disadvantaged families continue to have limited participation in secondary education. The regressive impact of user charges affects children particularly from illiterate and poor segments of the society. The greatest challenge to the EFA goal in Kenya, is therefore achieving equity by eliminating all existing disparities (GOK, 1999:69).

In recognition of these inequalities, and the continued crises in cost-sharing, the government in-built through different levels of the education programme, safety nets to cushion the poor and other vulnerable groups. The components of safety nets in education include; bursary schemes, the school feeding programme and the school text-book project.

Psacharopoulos and Woodhall (1985) argue that equity can be improved through redefining the role of the public sector. This involves allowing the market forces to cater for those individuals who are able to pay for education. Government subsidies should then focus on students who are unable to afford the education of their choice. In this case, the bursary facility ought to be expanded to benefit those suffering the greatest inequalities. Certainly, when limited resources are not targeted to counter disadvantages of certain groups, inequalities persist. It is worth noting that apart from tuition, a host of other school related costs combine to impact negatively to education access by the poor and the disadvantaged.

2.7 The Secondary Education Bursary Fund

The Ministry of Education operates a bursary scheme at constituency level, targeting poor households. The Secondary Education Bursary Fund (SEBF) was established in the 1993/4 financial year following a presidential decree. The scheme aims at cushioning the poor and the vulnerable groups against the high cost of secondary education (IPAR, 2003).

When bursaries were initiated in 1970s the money was sent directly to schools. Later, the responsibility was shifted to the county councils before it was taken to the Ministry of Education headquarters. Before 2003, bursaries were sent to schools which in turn awarded to deserving students based on need. The decision as to who received funds and how much, rested with the Board of Governors' meeting together with the head teacher, the local District Officer, and representatives of the Ministry of Education.

Since 2003, the SEBF is co-coordinated by Constituency Bursary Committee (CBC). In the revised guidelines for the disbursement of bursary funds, the CBC members receive appointment letters signed by the DEO on behalf of the Minister for Education with clear

terms of reference. The CBC should have a maximum of sixteen members a third of whom must be women. The functions of the CBC include: issuing and receiving bursary application forms, vetting bursary applicants using established criteria, verifying and ensuring that bursary cheques are dispatched to schools, and preparing reports to the Ministry of Education. According to the MOE's strategic plan (GOK, 2006) the disbursement of the bursary to the needy through their respective constituencies was meant to ensure correct identification and targeting of the beneficiaries.

The SEBF is not based on a fixed share of the national budget. Allocations vary depending on the Ministry of Education's annual provisions, the number of students enrolled in secondary schools within each constituency, the national secondary school enrolments, and poverty indices. The funds are disbursed in phases, arguably because some students dropout of school. Yet there is no guarantee that a student who benefits in the first phase will be considered in subsequent allocations. Students send their applications through the head teachers after endorsement by the local provincial administration or a religious leader. The SEBF government guidelines set the minimum amount to be awarded to students as Ksh.5000 in District Schools, Ksh.10, 000 in Provincial Schools and Ksh.15, 000 in National Schools. A part from the SEBF, Section 25 of the CDF Act allows MPs to use ten percent of the CDF on bursaries. This Act does not however, give the criteria for the selection of the group of students to benefit, nor the amount to be awarded.

The Constituency Bursary Fund National Management Committee (CBFNMC), established according to Section 5 (1) of the CDF Act has the oversight role of management. However, Section 23 (1) of the same Act stipulates that the responsibility of deciding the use of funds in every constituency lies with the Constituency

Development Committee. This apparent conflict in roles makes the monitoring of bursary allocation a tricky affair.

Since its establishment, the bursary scheme has been characterized by claims of inefficiency and ineffectiveness coupled with lack of transparency and accountability. For instance, out of the Ksh. 300 million set aside for bursaries in 1994, only about 150 million was disbursed (World Bank, 1995). The decentralization of the scheme to the constituency level was aimed at streamlining disbursements to only those who qualify (Economic Survey, 2004). It has been argued that while some constituencies have institutionalized systematic and transparent processes for broad-based participation in CBF decisions, others have pursued a personalized and politicized approach (Owino, 2006).

Following the changes in the allocation mechanisms since 2003, claims of misallocation of bursary funds, double awards to one student in two schools, awards to 'ghost' students, as well as excessive patronage by MPs resulting to skewed allocations have been reported (Namlola, 2006). There are also claims of students benefiting from more than one constituency. The Provincial Administration as well as the religious leadership has been faulted for giving misleading information regarding the applicants.

It has also been dismaying to note that amidst school dropout due to huge balances in terms of fees, there are claims, in some places, of the return of the bursary funds to the treasury due to non-application. In addition, Mukui (2006:11) notes that most parents have little information about the funds available and the rules governing allocation hence remain susceptible to manipulation by the political elites.

King (2005: 13) observes that corruption is a disabling environment for the operation of bursaries. Convincing as it was, to argue for the decentralization of the bursary allocations to target needy cases; empirical evidence reveals a bias beyond the desire for honesty in the CDF Committees. Questions abound as to whether the invisible agenda was to transfer the allocative powers from one class to another. One needs to examine the hidden administrative costs to understand the wreckage on the kitty meant to salvage the poor.

Rahage (1977:278) calls for the need to separate politics and education for order, efficiency and effectiveness in the delivery of educational services. It is perhaps in the same vein that Kippra proposes that MPs should be kept off the bursary fund (Ngari and Siringi, 2007). Similarly, teachers and parents have implored the government to have the facility transferred from the MPs (Wambugu and Otieno, 2007).

The government move to sever political patronage and conflict of interests by appointing professionals to manage the CDF though laudable, is dependent on political will.

Accordingly, the managers are charged with the responsibility of coordinating CDF projects within a constituency, preparing and submitting books of accounts and other operational and financial reports as well as listing and reporting all projects to the CDF secretariat (Kareith, 2007).

2.8 Previous Studies on the Bursary Scheme

Previous studies on the administration of the bursary facility indicate that there was limited awareness among parents on the existence of bursaries due to limited publicity of the scheme. Mukui (2005) and Owino and Abagi (2006) have found the awards of bursaries unclear. As a result, the scheme has not benefited many deserving children.

Mukui (2005) abhors the corruption of bursary scholarship through patronage which has closed avenues of social mobility for the gifted but poor children.

The Welfare Monitoring Survey II (WMS-II) indicates that only 22% of the children in the poorest quintile enjoy bursary relief. The survey further reveals that the current bursary only caters for 4% of the total student costs in secondary education. According to Maiyo (2006), there is no means testing to identify needy students and the funds are inadequate to meet the high cost of secondary education. It is in line with this that the PRSP (2001) calls for the expansion of the scheme to cater for at least 60% of the needy students.

A study by the African Population and Health Research Centre on the success of FPE shows the difficulties children born in slums have in reaching secondary schools. The study suggests the distribution of vouchers to parents to choose schools for their children to attend (Kimani, 2006). The Kippra Report (2006) cites access, equity and relevance, finance efficiency and management at school level, as the challenges facing secondary school education. The study attributes school dropout to poor economic conditions of the marginalized communities.

Owino and Abagi (2006:16) note that there is a serious dearth of studies on the administration, operation and impact of bursary on the group and recommend for an analysis of the composition of the bursary beneficiaries by socio-economic backgrounds. According to Boit (1988), a system that allows children from wealthy families to benefit disproportionately from public subsidy is considered inefficient and inequitable. It is within this framework that this study was conducted.

2.5 Conclusion

The literature reviewed indicates how equity in education is an elusive undertaking. While efforts have been made to enable the disadvantaged groups to access education by way of subsidies, targeting the vulnerable has been a problem. Consequently, the funds end up supporting undeserving cases. This calls for constant appraisals of strategies in place to make education subsidies responsive to the most disadvantaged. Hence, in examining the socio-economic backgrounds of the potential beneficiaries, this study aimed at critically assessing the strategy of targeting financial support to the poor and the needy to address equity in access to secondary education. This is the conviction upon which this research was anchored.

CHAPTER THREE

3.0 RESEARCH DESIGN AND METHODOLOGY

3.1 Introduction

This chapter deals with the research design and methodology used to achieve the objectives of the study. It describes the study area, the population, the sampling procedures, data collection instruments, the validity and reliability of the instruments and their administration, and the procedure for data analysis.

3.2 The Area of Study

The study was carried out in Trans-Nzoia West District in the Rift Valley Province. The district borders Mt. Elgon and Kwanza Districts to the north, Bungoma North District to the west, Lugari to the South-West, Uasin-Gishu to the South East, and Trans-Nzoia East District to the East. The geographical dimensions of the district apply to those of Saboti Constituency hence it is represented by one Member of Parliament.

Agriculture is the main economic activity supplemented by small scale business on market centres like Kiminini, Sikhendu, Saboti and Kitale town. The area is characterized by socio-economic inequalities with a large population of the landless poor owing to land clashes in the neighboring Mt. Elgon District as well as traditional squatter hood on large scale farms (District Development Plan, 2006). The District was riddled with controversy between the MP and the CDF Committee regarding the management of CDF, culminating in legal tussles. The researcher chose the area for convenience in terms of time and financial resources available.

3.3 Research Design

The study adopted a descriptive survey research design. Surveys are used to systematically gather factual quantifiable information necessary for decision-making. Ogula (1988) observes that surveys are an efficient method of collecting descriptive data regarding the characteristics of a population, current practices and conditions or needs. Surveys also gather information from relatively large cases by use of samples hence cutting down on costs.

In the light of these attributes, a descriptive survey design was adopted for this study to capture descriptive data from the selected sample upon which the findings were generalized to the population from which the sample was selected.

3.4 The Study Population

The target population of the study comprised 2674 form three students and school administrators in the 49 secondary schools, 5 Area Education Officers, 15 members of the provincial administration at locational administrative levels and opinion leaders in the district.

3.4.1 Sample and Sampling Procedures

Stratified random sampling technique was used to select 17 out of the 49 secondary schools in the district. The schools were selected according to the three categories; District, Provincial and Private. The researcher used stratified sampling technique because all the schools in the District were already stratified. Thus, the method ensured representation of all schools in the District in the sample proportion as in the population. Table 3.1 shows the number of Secondary Schools by category in Trans-Nzoia West District and how they were selected for the study.

Purposive sampling technique was used to select respondents for the interview. They were: 2 Education Officers, 3 Head teachers, 2 Chiefs and 2 religious leaders. The researcher believed that given their encounter with bursary applicants and the CBFC, they would provide the necessary information to augment responses from questionnaires. Simple random sampling was then used to select respondents from a stratified sample of school administrators, and Form Three students. The Form Three students were chosen because the researcher believed they could provide reasonably consistent information for about three years of the period under study. While the Form Four students would have been ideal, the study was conducted at the time they were writing their KCSE examinations hence inconvenient for them to participate. The student survey sample of 335 was selected on the basis of a generalized scientific guideline for sample size decision as given by Krejcie and Morgan (1970) attached to this study as Appendix A.

Table 3.1: Sampled Schools by Category

School category	Form three Student Pop.	No. of Schools in the District	No. Selected	% of school category
Provincial	895	9	4	44
District	1257	26	8	31
Private	522	14	5	35
Total	2654	49	17	35

Source: Trans-Nzoia West Education Office (2007)

3.5 Research Instruments

To collect primary data questionnaires and interview guides were constructed. However, for secondary data, the researcher used a guide to get documents for data extraction, compilation and analysis.

3.5.1 Questionnaires

The study employed self-completion (self-administered) questionnaires to gather data from the Form Three students as well as school administrators. They comprised of closed and open-ended items designed to seek information on the socio-economic backgrounds of the potential bursary beneficiaries, allocation procedures, perceptions on the performance of the scheme, as well as suggestions for improvement. While aware of the inherent shortcomings of questionnaires such as the inability to offer opportunity for prompting and clarification, the researcher preferred this instrument for quick collection of data from a large number of respondents and with little expenses. In addition, questionnaires offered greater assurances of anonymity and were free from the researcher's bias. This instrument was therefore considered a stable, consistent and uniform measure free from variation hence convenient for coding and analyzing responses

3.5.2 Interviews

An interview guide was designed to seek in-depth information from respondents regarding the performance of the SEBF, the challenges experienced in bursary disbursements and the impact thereof, and suggestions to make it responsive. While costly and with the temptation of bias the researcher considered interviews appropriate as they gave respondents an opportunity to express their arguments freely and exhaustively. The interviews intended to capture the feelings, attitudes, clarity of issues and suggestions of the opinion leaders, education officers and school administrators.

3.5.3 Document Analysis

School admission registers, class registers and correspondences with the (CBC) were examined using the document analysis guide for information on the socio-economic backgrounds of the bursary beneficiaries, repetition and drop-out rates, and trends in bursary awards to students in the sample schools from 2003 – 2007. This was corroborated with information from records at the District Education Office for bursary disbursements to schools.

3.6 Reliability of Research Instruments

Best and Khan (1986) define reliability as the degree of consistency demonstrated by an instrument or procedure. According to Mehren and Lehmann (1984:267), reliability is the degree of consistency between two measures of the same thing.

To determine the reliability of instruments, the researcher subjected the questionnaire to a pilot study involving four school administrators and sixteen students from two schools in the neighboring Bungoma North District. A product moment correlation co-efficient (r) was calculated to give the magnitude and direction of the relationship. Split half reliability was used to determine consistency of the multiple items scale. It was calculated using the formula given by Chandler (1988) as:

$$r = \frac{N \sum XY - \sum x \sum y}{\sqrt{N \sum x^2 - (\sum x)^2} \sqrt{N \sum y^2 - (\sum y)^2}}$$

The Pearson's moment correlation obtained for the split scores was subjected to Spearman – Brown Prophecy formula to obtain an appropriate correlation for the entire test. The Spearman – Brown prophecy formula as given by Tuckman (1972: 138) is

$$r_2 = \frac{nr_1}{1 + (n - 1)r_1}$$

Where r_2 = Correlated reliability

r_1 = Uncorrelated reliability

n = number of parts (2 for this case).

Using SPSS the split half reliability obtained was 0.86. According to Kothari (1985), a correlation of 0.80 or more implies a reliable data that can be used to make accurate predictions. On the basis of this, the instruments were accepted as reliable.

3.7 Validity of Research Instruments

Dane (1990:257) defines validity as the extent to which a measure actually measures what it is supposed to measure. According to Kerlinger (1973), validity answers the question; “are my findings true?” Kothari (1985) argues that validity can be determined by using a panel of persons to judge how well the measuring instruments meet standards.

To ascertain content validity of the instruments, the researcher consulted two subject experts from the School of Education, Moi University, while construct validity was through guidance and advice from test developers. The researcher further piloted instruments among MPhil students in the School of Education to check on the language, vocabulary and cultural sensitivity. The advice and suggestions given were incorporated.

3.8 Procedure for Data Collection

The researcher secured an introductory letter from Moi University, School of Education to seek a permit from the Ministry of Education to carry out research. The permit was used to secure authority from the District Commissioner, the District Education Officer, and the school administrators to access and interact with the respondents.

Before data collection, the researcher visited selected schools to secure appointments with the respondents. This facilitated arrangements and allocation of adequate time for the researcher to collect data. Similarly, the researcher secured appointments with the head teachers and leaders to be interviewed.

The researcher personally delivered and collected the questionnaires from the respondents as well as examined records for secondary data. Attached to questionnaires was a letter assuring respondents of the confidentiality with which their responses would be given. The researcher used self-completion administered questionnaires, record checking guide, and an interview guide to gather data.

3.9 Data Analysis and Presentation

The data collected was coded and analyzed using the statistical package for social sciences (SPSS). Frequencies, percentages, and means were used to present data on the background information of the respondents and on some aspects of the study like disbursement procedures. The findings were presented using tables.

CHAPTER FOUR

4.0 DATA PRESENTATION, INTERPRETATION AND ANALYSIS

4.1 Introduction

This chapter deals with the analysis and interpretation of data in the light of the socio-economic composition of the beneficiaries, the effectiveness of the allocation procedure in targeting the needy, and the impact of the bursary facility to the target group. A general analysis of data generated from the responses of Form Three students, school administrators and from representatives of the CBFC is discussed. Frequency distributions and percentages are calculated and displayed in tabular form. This study sought to answer the following research questions;

- (i) Who are the beneficiaries of bursary funds by socio-economic background?
- (ii) How effective is the current bursary allocation mechanism in targeting the vulnerable?
- (iii) What is the impact of the bursary scheme on equity in access to secondary education?

4.2 Study Population

A total of 335 students, 17 school administrators, education officers, chiefs and religious leaders participated in the study. An analysis of returned questionnaires for 176 (53%) male and 157 (47%) female students and 17 for school administrators was done. The responses were corroborated with findings from interviews. .

4.3 Biographical Data on Respondents

Table 4.1 below describes the characteristics of respondents.

Table 4.1: Biographical Information on Student Respondents

Tem	Description	Frequency	Percentage
Age	15-16 years	40	12
	17-18years	241	72
	19-20 years	47	14
	21 and above	7	2
Gender	Male	176	53
	Female	157	47
Citizenship	Citizen	332	99
	Non-citizen	3	1

As indicated in the table, most respondents were in the age range of 17-18 years and except for 3, all were Kenyan citizens. In addition, 13 school Principals, 3 Deputy Principals, and 1 Director of a private school, two area chiefs and two education officers one of whom was the secretary to the Constituency Bursary Committee (CBC) participated in the study.

4.4 Background Information of Student Respondents

Table 4.2 below gives the education background of student respondents in terms of the type of primary schools they attended, their KCPE performance as well as their admission in secondary school.

Table 4.2: Education Background of the Respondents

Item	Description	Frequency	Percentage
Type of primary school attended	Public day	259	77
	Public boarding	23	7
	Private day	23	7
	Private boarding	30	9
KCPE marks	Below 250	16	5
	250-300	143	43
	301-350	117	35
	351-400	51	15
	Above 400	8	2
Year of admission	2004	19	6
	2005	198	59
	2006	47	14
	2007	71	21

As shown in the table, findings indicated that 259 (77%) of the respondents attended public day primary schools while 23 (7%) attended public boarding with a similar number and 30 (9%) attending private day and private boarding schools respectively. This distribution implies that only about 25% of the respondents' parents could afford boarding and or private primary education for their children. The study also revealed that majority of the respondents (78%) scored between 250-350 marks in their K.C.P.E examinations. The implication is that given similar learning conditions, these students could favorably compete academically.

With regard to the year of the respondents' admission in their various schools, it was noted that 19 (6%) had repeated at least one class, while 117 (35%) had joined their schools on transfer. The new admissions implied that some students had dropped out of school thus creating room for replacement. Secondly, it could also imply that student mobility across school categories could have been influenced by the financial ability to meet fees in the schools of choice.

4.5 Socio-economic Backgrounds of the Potential Bursary Beneficiaries

Information was gathered with regard to the socio-economic profile of the potential bursary beneficiaries from among the sampled form three respondents. Similarly, an in-depth analysis of 127 form three beneficiaries of the 2007 bursary awards was done.

The study revealed that 63% of the respondents came from nuclear families of monogamous nature, 27% from extended families of polygamous type while 14% belonged to single – parenthood families. Out of the total student response, 247 (74%) had both their parents alive, 77 (23%) had only one of the parents alive while 11(3%) were total orphans. While it cannot be concluded that all orphans are vulnerable a 26% composition implies that unless checked, a significant number may be excluded from school.

Table 4.3 describes the distribution of respondents’ siblings in educational institutions and by implication the level of burden born by their parents.

Table 4.3 Respondents’ Siblings in Educational Institutions

Sibling in high school and college	Frequency	Percentage
Nil	79	23
1 – 2	151	45
3-4	80	24
5-6	21	6
7 above	4	2
Total	335	100

Out of 335 responses, 79 (23%) had no siblings in Secondary schools and or colleges, 151(45%) had at least 1-2, while 80(24%) had about 3-4. This compares with 21(6%) who had 5-6 and only 4(2%) had either 7 or more siblings in such institutions. With over 75% having at least a sibling in secondary school, and in consideration of the high cost of education amidst economic recession, majority of the students require subsidization.

The study also sought responses on the level of education the parents of the respondents.

Their responses are presented in Table 4:4 below.

Table 4:4: Level of Education of Respondents' Parents.

Education level	Parent	Frequency	Percentage
Primary	Father	67	20
	Mother	113	34
Secondary	Father	88	26
	Mother	122	36
College	Father	129	38
	Mother	86	26
University	Father	51	15
	Mother	14	4
Totals	Father	335	100
	Mother	335	100

The findings revealed that 20% of the respondents indicated that their fathers had attained primary level of education as compared to 34% for their mothers. Similarly, 26% and 36% responses for fathers and mothers respectively had secondary level of education while 38% and 26% for fathers and mothers respectively were indicated for college level education. In terms of university education, 15% of the respondents indicated that their

fathers had university education as compared to only 4% for their mothers. This implies that gender disparity in education attainment is an issue worth consideration. If a child's education opportunities are determined by the educational background of parents the findings indicate that only about 19% can have such an influence

4.5.1 Family Property Ownership

Responses were sought with regard to the living standards of the of the respondents' families in terms of assets, farm acreage and, the type and nature of residential house owned as well as utilities in their houses. Table 4.5 illustrates responses on these aspects. As described in the table below, the study revealed that 245 (73%) owned at least one of the assets given, 61 (18%) owned two, 19(6%) owned three, 9 (3%) owned four with only 4 indicating that they owned all of the assets listed.

Table 4.5: Family property Ownership

Item	Description	Frequency	Percentage
No. of Assets owned (residential houses, business premises, commercial vehicles, machinery)	1	245	73
	2	61	18
	3	19	6
	4	9	28
	All	1	0
Size of farm	Below 1 acre	84	25
	1-3 acres	142	43
	4-10 acres	78	23
	11-20 acres	17	5
	Over 20 acres	14	4
Type of house occupied	Rental	35	11
	Family owned	292	87
	Employer/institutional	8	2
Nature of house owned	Grass thatched & mud walls	40	12
	Corrugated iron roofs & mud walled	177	53
	Corrugated iron roof with stone/bricks	100	30
	Tile roofed	13	9
	Others	5	1
Utilities in the House (tap Water, Electricity Telephone, computer, internet)	None	222	66
	1	50	15
	2	41	12
	3	20	6
	All of them	4	1

All respondents indicated that their families owned land. However, 84 (25%) had less than an acre of land, 142 (43%) owned 1-3 acres, 78 (23%) had 4-10 acres, 17(5%) owned 11-20 acres while 14 (4%) claimed had over 20 acres of land. With a great majority owning less than 3 acres of land in an economy relying on agriculture, it can be deduced that most parents were likely to face difficulties in fees payment.

With regard to the type of house their parents occupied, 292(87%) lived in family owned houses, 35(11%) in rental houses, while 8(2%) lived in institutional houses. For those living in family owned houses, 177(53%) lived in corrugated iron sheet roofed and mud walled houses while over 118(34%) lived in permanent structures. This compares with 40(12%) who lived in grass thatch roofed with mud walled houses.

Responses were sought to establish the utilities found their houses. Respondents chose from a list that included electricity, tap water, television, computer, and internet. 222(66%) of the respondents claimed their houses did not have any of the items presented, 50(15%) claimed one, 41(12%) indicated two, 20(6%) claimed to have had three while only 4 (1%) claimed availability of all items. Property ownership by families reveals that over 60% were struggling and lacked disposal income to guarantee the education of their offspring.

4.6 Fees Status of the Respondents

The study further sought to establish the fee status of the respondents and by extension, the level of individual need. Table 4.6 below presents the responses.

Table 4.6: Respondents' Fees Status by Nov. 2007

Fees balance as by Nov. 2007	Frequency	Percentage
Nil	95	28
Below 5000	83	25
5,000-10,000	88	26
11,000-20,000	47	14
Above 20,000	22	7
Total	335	100

As shown in table, 95(28%) of the respondents indicated that they had met their fees obligations, 83(25%) had fee balances of less than Ksh.5, 000, 88(26%) owed schools between Ksh.5000-10,000 while over 20% had balances of over Ksh. 11,000. This implied that about 70% of the secondary education students experienced problems in fees payment. The implication is that apart from increasing subsidies in form of bursary, there is need to review the method of targeting the beneficiaries.

4.7 Bursary Disbursement to the District

Records from the District Education Office with regard to bursary disbursement to the district indicated an upward trend in allocation on yearly basis. Table 4.7 below shows annual allocation of bursary funds to the constituency by the MOE for the period under study.

Table 4.7: Bursary Disbursements to the District

Year	1st Disbursement	2nd Disbursement	3rd Disbursement	Total
2003	1,000,000	-	-	1,000,000
2004	4,089,159	395,026	-	4,484,185
2005	3,227,736	2,714,956	-	5,942,692
2006	1,000,000	2,465,664	2,400,029	5,865,693
2007	3,129,585	3,129,585	-	6,259,170
TOTAL				23,551,740

SOURCE: District Education Office - Trans-Nzoia West, Nov. 2007

Records at the District Education Office indicated that the annual Ministry of Education (MOE) bursary disbursements to the constituency had steadily increased from 1 million in 2003 to over 6 million in 2007. This represented a percentage increase of 626. Ideally,

this would imply an increase in the number of vulnerable children receiving bursary assistance and or an increased amount allocated to the beneficiaries.

4.7.1 Bursary Awards by the Constituency Bursary Fund Committee

Neither the District Education Office nor the Constituency Office had records of bursary disbursement to schools for the year 2003. This could be attributed to the low level of awareness among the beneficiaries hence less demand on the part of the public for transparency and accountability. Table 4.8 shows the disbursement of bursary funds to students for the period 2004 – 2007.

Table 4.8 Bursary Disbursement to Schools

Year	MOE allocation	Disbursement to Students	Difference
2003	1,000,000	No Record	
2004	4,484,185	5,179,500	-693315
2005	5,942,692	5,881,700	60,992
2006	5,865,693	4,663,100	1,202,593
2007	6,259,170	3,453,000	2806170

SOURCE: Trans-Nzoia West District Education Office. Nov. 2007

4.7.2 Bursary Awards among School Categories

Records for bursary awards to students were further categorized according the type of schools. This is as presented in Table 4.9 below

Table 4.9: Bursary Awards among School Categories in the District

Year	School category	Av. Enroll.	No. of schools	No. awarded	Amount disbursed.	% of MOE allocation	Av.alloc/ Student	% of fee
2004	Provincial	400	6	165	1,015,500	23	6,155	26
	District	194	7	230	793,000	18	3,448	27
	Private	180	2	6	27,000	0.6	4,500	17
2005	Provincial	400	6	246	1,346,500	23	5,474	23
	District	194	8	242	690,000	12	2,808	22
	Private	180	2	6	24,000	0.4	4,000	13
2006	Provincial	400	7	180	1,012,000	17	5,622	23

Records in respect of the sampled schools indicated that despite government guidelines with regard to the minimum allocation per student as Ksh 5,000, the majority of students received as little as Ksh 2,000. The implication is that the bursary facility had little role in assisting the vulnerable as intended. On average, beneficiaries in Provincial Schools received about Ksh 6000 which was about Ksh 4000 below recommended assistance. Similarly, those in District Schools received on average Ksh 4000 which was slightly below the Ksh 5,000 recommended. Table 4-10 describes the amount as allocated to students in school categories.

It is important to note that the average fee percentage was based on the average fees charged in the categories of schools as Ksh 24,000 in Provincial Schools, Ksh.13, 000 in District Schools and Ksh 30,000 in Private Schools. It was observed that the CBC sought to satisfy as many applicants as possible and in effect distributed little amounts to many students which in turn had little effect on their fee requirements. In allocations where

guidelines on minimum amounts to be awarded were observed, like in the 2006 and 2007 allocations, the numbers of beneficiaries were significantly reduced.

A striking observation however was the low amount awarded to schools within the district. Apart from the year 2004 where 58% of the total disbursement to the district went to students in schools within the study district, allocations in subsequent years indicate a downward trend with 2007 recording only 20%. While records were available indicating the beneficiaries in the various schools in the republic, it is curious that most of the vulnerable students from the district were enrolled in schools outside the district. This observation further raised questions of transparency and accountability with which the CBC discharged its duties. It also implied that with a high percentage of resources going outside the district there was inter- regional inequity in education development.

Records indicated that only about half of the amount allocated from the ministry in 2007 had been disbursed to students. Nevertheless, it is also worth noting that in 2004, the CBC awarded Ksh.693315 in excess of the MOE disbursement. The apparent lack of harmony between the money disbursed to the district and the amount awarded to students raise questions of accountability. An interview with CBC the secretary revealed that the extra amount came from the Constituency Development Fund (CDF) kitty an indication that the SEBF cannot be accounted separately from the CDF bursary.

4.7.3 Use of Bursary Facility among Potential Beneficiaries

The research sought knowledge and the use as well as perceptions among the potential beneficiaries with regard to the availability and use of bursary funds. The responses are described in Table 4.10 below.

Table 4.10: Use of Bursary Facility

Item	Description	Frequency	Percentage
Whether or not ever applied for bursary	Yes	181	54
	No	154	46
No. of times of bursary application	1	52	29
	2	74	41
	3	32	17
	More than 3	23	13
Amount of Bursary received since Form I	Nil	83	46
	Below 5000	68	38
	6000-10,000	22	12
	11,000-15,000	5	3
	16,000-20,000	3	1
Number of constituencies from which bursary was given	None	83	46
	One	74	40
	Two or more	24	13

Responses indicated that 181(54%) at least applied for bursary while 154 (46%) had not. For those who had ever applied, 52(29%) had applied once 74(41%) had applied twice while 55(30%) indicated to have applied at least thrice or more. Their response is captured in table 4.10 above.

Yet with these patterns of application, it was observed that 83 (46%) of the applicants from among the respondents had never received bursary assistance, 68(38%) had received less than Ksh.5000, 24(12%) indicated to have received between Ksh. 6000 – 10,000 and only 8(4%) had received Ksh. 11,000 and above for the period under study. The study also found that of the 98 respondents who had ever benefited from bursary, 74 (75%) had been assisted from one constituency while 24 (25%) had been supported by

more than one constituency. The fact that some children can benefit from more than one constituency points towards structural weaknesses in the administration of the funds that allow well connected students to benefit at the expense of others.

In response to the item as to why some respondents had not applied for bursary, 56 (30%) cited the cumbersome application procedure that did not guarantee assistance, 59 (38%) indicated that they did not require assistance while, 40 (26%) doubted the seriousness of the bursary offer. The implication is that a number of the vulnerable children do neither apply for nor access the bursary funds due perceived complexities in the allocation mechanism.

4.7.4 Nature and Composition of the Beneficiaries

In an effort to establish the real beneficiaries of the bursary awards, the study examined school records for the year 2007. The findings are as presented in Table 4.11 below. Of the 127 Form 3 students who received bursary funds 24 (19%) were totally orphaned, 36 (28%) were partially orphaned while 67(52%) had both their parents alive.

Table 4.11 Nature and Composition of the Beneficiaries

Item	Description	Frequency	Percentage
Parental status	Total orphaned	24	19
	Partial orphaned	36	28
	Not orphaned	67	53
Parents occupation	Civil servant	48	38
	Politician	5	4
	Farmer	18	14
	Businessman	14	11
	Peasant farmer	38	30
	Others	4	4
Fees balance by Nov. 2007	20,000 – above	36	28
	10,000 – 20,000	30	23
	5,000 – 10,000	29	23
	Below 5,000	9	7
	Nil	23	18

With regard to the occupation of parents and or guardians, 63% of the beneficiaries belonged to families of civil servants, civic leaders, businessmen and farmers while 35% belonged to families of peasant farmers and small scale traders. The fact that children from fairly well off families benefit from a kitty established for the poor raises concern on the allocation criteria.

An examination of fee records of the beneficiaries as by November 2007 indicated that only 24 (19%) had completed their fees payment. On the contrary, 36 (28%) owed their schools over Ksh.20, 000 in fee arrears. Those who owed schools large balances were students from peasant families and most of them came from district schools. In contrast, those in Provincial schools had little fee balances or had cleared payments.

4.8 Students' Perceptions of the Bursary Scheme

The research sought to establish the extent of agreement with statements regarding the application procedure and the impact of bursary to the vulnerable students. Their responses were measured on a 5 point Likert scale representing the degree of agreement as given in Table 4.12

Table 4.12: Students' Perceptions of the Bursary Facility

Statement	SA 5	A 4	U 3	D 2	SD 1	MEAN
	f	f	f	f	f	
Bursary has enabled orphans to learn.	26 (8)	35 (11)	41 (12)	133 (40)	100 (30)	2.3
Applicants cheat to get bursary	26 (8)	32 (10)	104 (31)	108 (32)	64 (19)	2.5
Application forms are easily available	73 (22)	103 (31)	32 (10)	74 (22)	52 (16)	3.2
My HT recommends all for bursary	78 (23)	80 (24)	26 (8)	75 (22)	76 (23)	3
Feedback on bursary application is timely	32 (10)	64 (19)	33 (10)	84 (25)	122 (36)	2.6
One can appeal for more funds	32 (10)	39 (12)	62 (19)	97 (29)	104 (31)	2.4
Orphans are well catered for	63 (19)	76 (23)	27 (8)	100 (30)	68 (20)	2.8
Application process is easy and straight	52 (16)	79 (24)	26 (8)	82 (24)	9 (3)	2.5

Legend: % in parentheses

In response to the statement as to whether the bursary scheme had enabled orphans to access education, 26(8%) strongly agreed, 35(11%) agreed, 41(12%) were undecided, 133(40%) disagreed while 100 (30%) strongly disagreed. Similarly, 26(8%) strongly agreed that applicants cheat to get bursary funds, 32(10%) agreed, 104(31%) were undecided, 108(32%) disagreed as 64(19%) strongly disagreed.

The research further sought information with regard to the application and processing of the funds from the students' point of view. Responses indicated that 73(22%) strongly agreed that the application forms are readily accessible to students, 103(31%) agreed, 32(10%) were undecided, 74(22%) disagreed while 52(16%) strongly disagreed. Responses were also sought with regard to the school administrators recommending all applicants for bursary. It emerged that 78(23%) of the respondents strongly agreed, 80(24%) agreed, 26(8%) were undecided, 75(22%) disagreed and 76(23%) strongly disagreed. Interviews established that while most provincial schools made enough copies for the applicants, the situation was different in District schools requiring applicants to get application forms on their own due to financial constraints.

In response to the statement that feedback on bursary application is timely, 36(10%) of the respondents strongly agreed, 64(19 %) agreed, 33(10%) were undecided as 84(25%) and 122(36%) disagreed and strongly disagreed respectively. Similarly, 32(10%) strongly agreed with the statement that the CBC provides for appeals for the unsuccessful applicants as 39(12%) agreed. However, 62(19%) were undecided, 97(29%) disagreed while 104(31%) strongly disagreed. This response compares with the average response score of 2.5 on the statement regarding the ease and straight forwardness of the

application procedure. Curiously, majority respondents did not believe the bursary facility catered for orphans as only about 41 percent responded in affirmative.

The implication is that the application procedure, the methods of identifying beneficiaries and dishonesty among some students and or parents combine to deny majority of the vulnerable children access to the funds meant to subsidize their education. Consequently their education programmes are interrupted.

4.9 School Administrators' Perceptions of the Socio-economic Composition of Bursary Beneficiaries

In seeking to establish the socio – economic composition of the bursary beneficiaries in the schools under study, the school administrators responded to statements stating their degree of agreement. A 5 point Likert scale was provided from 5-1 representing the strength in agreement with the statements. Their responses are illustrated in Table 4.13

Table 4.13: School Administrators' Perceptions of the Bursary Beneficiaries

Statement	SA 5	A 4	U 3	D 2	SD 1	Mean
	f	f	f	f	f	
Bursary beneficiaries are genuinely needy cases		1 (6)	3 (18)	10 (59)	3 (18)	2.4
Beneficiaries are from poor backgrounds	1 (6)	1 (6)	3 (18)	10 (59)	2 (12)	2.7
Beneficiaries are children affected by the HIV/AIDS	1 (6)	4 (24)	1 (6)	7 (41)	4 (24)	2.5
Boys and girls benefit equally from bursary	4 (24)	4 (24)	1 (6)	7 (41)	1 (6)	3.7
Students from diverse backgrounds benefit equally	4 (24)	3 (18)	4 (25)	3 (18)	3 (18)	3.7
Orphans are well catered for	1 (6)	4 (24)	1 (6)	6 (35)	5 (29)	2.7
Beneficiaries are socio-politically connected	1 (6)	7 (41)	7 (41)	2 (12)		3.9
Beneficiaries are from well-off families	1 (6)	10 (59)	3 (18)	2 (12)	1 (6)	3.9
Beneficiaries are perennial fee defaulters	3 (18)	6 (35)	2 (12)	4 (24)	2 (12)	3.7
Beneficiaries are from illiterate backgrounds		2 (12)	3 (18)	4 (24)	8 (47)	2.2

Legend: % in parentheses

In response to the statement that the bursary beneficiaries were genuinely needy cases, only 1(6%) agreed, 3(18%) were undecided as compared to 10(59%) who disagreed. To augment the above information, response was sought to the statement that beneficiaries were from poor backgrounds to which 2(12%) strongly agreed, 3(18%) agreed as compared to 10(59%) who disagreed.

Response with respect to the role of the bursary in assisting students disadvantaged in one way or another by the HIV/AIDS pandemic gave a weighted mean of 2.5 meaning within the realm of disagreed. Only 1(6%) respondent strongly agreed that the fund had benefited affected children, 4(24%) agreed as compared to 7(41%) who disagreed and 4(24%) who strongly disagreed. With regard to gender consideration in the award of bursary, 48% response was affirmative. Responding to the statement that bursary beneficiaries came from diverse backgrounds 4(24%) strongly agreed, with 3(18%) agreed, 4(24%) were undecided, 3(18%) and a similar response respectively agreed and strongly disagreed.

On whether the scheme had taken care of the orphans, 30% agreed as compared to 64% who disagreed. Nevertheless, response on the statement that the beneficiaries were socio-politically connected registered 47% in agreement as compared to 12% who disagreed. This response was reinforced by responses to the statement that beneficiaries came from well off families that recorded a weighted mean of 3.9 meaning that respondents tended to agree. Responses also indicated that the bursary scheme did not give preference to children from illiterate backgrounds recording a weighted mean of 2.2 meaning disagreement. From responses exhibited, it can be deduced that the fund did not target the vulnerable since beneficiaries came from diverse backgrounds.

4.10 Administrators' Perceptions of the Bursary Processing Mechanism

Findings also showed that the bursary application procedure was faulted. Table 4.14 shows responses on statements regarding the effectiveness of the procedure.

Table 4.14 Responses on Bursary Processing Mechanism

Statement	SA 5	A 4	U 3	D 2	SD 1	Mean
	f	f	f	f	f	
Applications forms are accessible to students	10 (59)	7 (41)	- -	- -	- -	4.5
Application process is easy and straight forward	2 (12)	5 (29)	4 (24)	6 (35)	- -	3.1
The process is time consuming	2 (12)	10 (59)	5 (29)	- -	- -	3.8
Applicants cheat to get bursary	1 (6)	10 (59)	5 (29)			3.7
Political influence determines the beneficiaries	2 (12)	6 (35)	2 (12)	7 (41)		3.1
Applications are processed in time.				17 (100)		1.8
Feedback on application is given on time				17 (100)		1.8
Explanations are given to unsuccessful applicants			10 (59)	7 (41)		2.5
The CBC provides for appeals for more finding			13 (76)	4 (24)		2.7
Bursary funds are remitted to schools in time				10 (59)	7 (41)	1.5

Legend: % in parentheses

While the application forms were readily available to applicants recording a weighted mean response of 4.5, it was observed that the process was time consuming and encouraged dishonesty among the applicants.

It emerged from the responses that 2(12%) strongly agreed with the statement that applicants cheat to get funds, 10(59%) agreed as compared to 5(29%) who disagreed. Responses also indicated that political influence played a role in the allocation of funds. Indeed, 2(12%) strongly agreed with the statement, 6(35%) agreed, 2 (12%) were undecided while 7(41%) disagreed. In addition, responses showed that the processing of awards and the remittance of the funds to schools took unnecessarily long. This was reinforced by findings from interviews that attributed delay in disbursement to “official release of cheques” by the MP or his representative. Similarly, there were neither explanations to nor opportunities for appeal for funding by unsuccessful applicants. The weighted mean response for the respective statements was 1.8 indicating disagreement.

The apparent dishonesty in the application and awards of the funds, the delay in the disbursement of funds occasioned by political patronage create a disabling environment for those who largely depend on bursary for education. This calls for a further evaluation of the role of politicians in the management of these funds.

4.11 Impact of the Bursary Scheme

In examining the impact of the bursary scheme unto the needy, the research sought responses on the level of consistency with which the CBC executed awards to beneficiaries and the degree of alleviation as compared to the need. Similarly, opinions were sought from school administrators with regard the impact of the scheme to the vulnerable.

4.11.1 Level of consistency in Bursary Awards

An examination of the level of consistency in bursary awards for the beneficiaries revealed a low degree of consistency in the awards. Few cases benefited consecutively for their three year period in secondary school. Table 4.15 illustrates this.

Table 4.15 Consistency in Bursary Awards

Description	Frequency	Percentage
Once	74	52
Twice	51	36
Thrice	16	11

Only 11% of the respondents claimed to have been supported for the three years in school. This raises the question of efficiency since much of the support could have gone into waste with those who had had support dropping out of school for lack of funds. The implication is that it is difficult to establish how many were facilitated by bursary to accomplish their secondary school course. Consequently the impact of the fund unto the vulnerable could not be easily established. What happens to those who are assisted once if their only source of fees is the bursary facility?

4.11.2 Perceptions on the Impact of the Bursary Scheme

A 5 point Likert scale was used to gather views from school administrators on the impact of the scheme. Responses indicated that the funds were inadequate albeit to a degree have assisted the needy to access education and enhance transition to, and retention in secondary schools. It was however doubtful as to whether the fund had narrowed disparity either in education access among the socio-economic groups or in infrastructural development among school categories. The responses are described in table 4.16.

Table 4-16: Perceptions on the Impact of Bursary

Statement	SA	A	U	D	SD	Mean
	5	4	3	2	1	
	f	f	f	f	f	
Bursary funds are adequate to meet students education needs				10 (58)	7 (41)	1.5
The fund has enabled the vulnerable to access education		5 (29)	4 (24)	8 (47)		2.8
The scheme has enhanced equality in education opportunities		6 (35)	2 (12)	7 (41)	2 (12)	2.7
Bursary has narrowed disparity in school infrastructural development.		3 (18)	4 (24)	10 (58)		2
Some students benefits from more than one constituency		10 (58)	3 (18)	4 (24)		3.3
Bursary scheme has marginalized disadvantaged groups		4 (24)	2 (12)	6 (35)	4 (24)	2.4
Bursary funds have enhanced transition to secondary education		8 (47)	1 (6)	7 (41)	1 (6)	2.9
The scheme has narrowed disparity in education opportunities among groups				10 (58)	7 (41)	1.6
Bursary funds has enhanced students retention rates		9 (53)	3 (18)	5 (29)		3.2
Bursary scheme has enhanced completion rates		8 (47)	1 (6)	7 (41)	1 (6)	2.9

Legend: % in parentheses

Responding to the statement that the funds were adequate to meet educational needs of the beneficiaries, 10(58%) disagreed while 7(41%) strongly disagreed. In addition, 59(29%) agreed that the funds, had enabled the vulnerable to access education as

compared to 8(47%) that disagreed. With regard to the role of bursary in enhancing equality in educational opportunities, 6(35%) agreed, 7(41%) were undecided as 2(12%) strongly disagreed. This response could be due to the fact that the fund only catered for those already enrolled in secondary schools leaving out prospective Form Ones without financial abilities.

In response to the role of bursary in narrowing the disparity in school infrastructural development, 18% agreed as compared to 24% who were undecided, and 58% who disagreed. This response reflects the low bursary awards to District as compared to Provincial schools. Responding to the statement that the scheme had marginalized the disadvantaged, 24% agreed, as compared to 58% who disagreed. Similarly, 58% disagreed with the statement that the bursary facility had narrowed the disparity in education opportunities among socio-economic groups, as 41% strongly disagreed. With regard to the funds' enhancement of access, retention and transition rates, a weighted mean response of 3 was recorded indicating undecided.

Responses also indicated that the bursary facility was unfairly exploited by some applicants who transcended their residential boundaries as 58% of the respondents agreed that some students received bursary awards from more than one constituency. This response compares with that for students that pointed towards dishonesty in a bid to secure assistance.

4.12 Measures to Improve the Bursary Scheme

Suggestions were floated on the possible options to be explored to make the fund more responsive to the target group. A five point likert scale was used to gauge priority given to every suggestion whereby VH referred to very high priority while VL referred to very low priority. These responses are as distributed in table 4.17.

Table 4.17: Suggestions on Improving Bursary Scheme

Statement	VH 5	H 4	U 3	L 2	VL 1	Mean
	f	f	f	f	f	
Beneficiary representation on the CBC			6 (35)	9 (53)	2 (12)	2.5
Stakeholder election of CBC members	11 (65)	4 (24)			2 (12)	4.2
Limitation of political patronage	13 (76)	2 (12)			2 (12)	3.8
Increase funding	6 (35)	3 (18)	1 (6)	6 (35)	1 (6)	3.4
Setting a definite calendar for bursary applications and processing	12 (71)	4 (24)			1 (6)	4.5
Establish Management Information System	13 (76)	3 (18)			1 (6)	4.5
Institute Monitoring & Evaluations systems	13 (76)	2 (12)	1 (6)		1 (6)	4.5
Funds to be allocated at school level	15 (88)	1 (6)	1 (6)			4.8
Publicize applicants and the beneficiaries	15 (88)	1 (6)	1 (6)			4.8
Management of funds by professionals	6 (35)	3 (18)	4 (24)	3 (18)	1 (6)	3.5

Of the suggestions offered to revitalize the fund, the highest priority was accorded to the establishment of the Information Management Systems, the Monitoring and Evaluation Systems and setting of a definite calendar for bursary application and processing. All these options registered a weighted mean of 4.5. Respondents also wanted an opportunity for participatory decision on the composition of the CBC. Similarly, majority of the respondents were for the allocation of funds at school level, the publicization of applicants and beneficiaries, and the limitation of political patronage in the management of the funds. Nevertheless, while considered important, suggestions to increase the funds, and the management of funds by professionals were not rated highly.

CHAPTER FIVE

5.0 DISCUSSION OF FINDINGS, CONCLUSIONS AND RECOMMENDATIONS

5.1 Summary of Findings

As already indicated, this study sought to establish the effectiveness of the Secondary Education Bursary Fund in enhancing equity in access to educational opportunities. The discussion and implications of the findings below are presented in accordance with the research questions that this study set out to answer. The study findings centered on the three areas investigated as follows:

- (i) The socio-economic composition of the bursary beneficiaries.
- (ii) The effectiveness of the bursary allocation mechanism in targeting the vulnerable groups.
- (iii) The impact of the bursary scheme on equity in access to secondary education.

5.2 Discussion and Implications of the Research Findings

In chapter two of this study, a comparative review of education subsidies across the world showed how equity in education is an elusive undertaking. It was therefore considered imperative to appraise strategies aimed at making education subsidies responsive to the disadvantaged. It was concluded that there was need to critically examine the socio-economic backgrounds of the potential and actual beneficiaries, the bursary allocation mechanisms and their impact on equity in access to secondary education.

5.2.1 Socio-economic Composition of Bursary Beneficiaries

Only 5 out of the 17 schools that participated in the study kept records of the vulnerable students, describing the nature and degree of vulnerability. In the absence of this

information, it implies that schools recommend bursary for all applicants regardless of their need.

The study established that against the objectives for which the fund was founded the system of bursary allocation was inequitable since a majority of the beneficiaries were children from well off families, majority of whom were enrolled in Provincial schools. Evidence from records showed that about 63% of the 2007 bursary beneficiaries were children whose parents were civil servants, politicians, farmers or businessmen. Only 30% belonged to peasants and small scale traders like hawkers. The fact that such a huge percentage benefited from a kitty established for the poor raises concern on the criteria of bursary allocation.

It was also evident from the findings that as most needy cases missed out on the kitty, children from able families received bursary even when records indicated that they had completed fees payment. The implication is that the fund meant to enhance equity had been infiltrated by non -deserving cases.

An equally compelling observation was that a large proportion of students in provincial schools had their primary education in private academies, an indication that they were not needy yet they received the greatest amount of bursary awards. The implication is that the low bursary awards to students in Day schools impacted negatively unto infrastructural development in such schools. This in turn, contributed to the low quality of services in those schools. The fact that they are tested and graded on the basis of a common examination shows how education subsidies if not well targeted can perpetuate social inequalities.

A strikingly notable observation was that between 60% and 80% of the ministry's disbursement to the district was awarded to students outside the district. The implication is that majority of the vulnerable students from the district accessed their secondary education away from the home district. Curiously, such students were awarded funds above the minimum as compared to their colleagues in schools within the district. This disparity tended to negate the noble objective of equity for which the fund was established.

5.2.2 Allocation Mechanism

The study faulted the system of targeting the vulnerable by the CBC. First, it was observed that in many instances the advice of the Head teachers with regard to needy children was ignored. Consequently, in most cases a uniform amount was allocated to the beneficiaries in each school category irrespective of the outstanding fee balances and the actual financial needs of the students. This apparent uniform support flouts the principle of equity since beneficiaries do not originate from similar socio-economic circumstances.

Secondly, the application process was unnecessarily bureaucratic requiring documents that the CBC lacked the capacity or will to verify. This bureaucracy coupled with poor communication between the CBC and students discouraged subsequent applications especially for those who did not benefit in previous allocations. Similarly, the composition of the CBC, which is elitist in nature, was found to be intimidating to the poor

Thirdly, the fact that the fund targeted only those already enrolled for secondary education denied the prospective Form Ones from poor background an opportunity of joining schools of their choice. One other emerging issue was that bursary allocations were made in the months of March to October. The implication is that the fund did not

assist children joining Form one. Consequently, due to inability to raise fees required for provincial schools, such children forfeit their chances to those from well off families. Yet the greatest amount of the bursary subsidy as based on government guidelines is channeled to support children in such schools.

It was overwhelmingly agreed that political patronage negatively influenced skewed allocations of funds since the Member of Parliament determined the composition of the CBC. This patronage was further manifested in the disbursement of funds to schools which was unnecessarily delayed to await a public forum to “officially release the cheques”. Cases of delays in disbursement of funds to schools, and inconsistent bursary support beg for effectiveness and efficiency in the allocation mechanism.

While guidelines to the on how to identify needy cases appeared inadequate, the CBC flouted the same by awarding funds well below the minimum Ksh 5,000 required. The amount awarded in most cases, did not guarantee stability of vulnerable students in school. It was also evident that the funds were awarded to undeserving students as much as to non applicants at the expense of the needy. There were also cases of similarity in names of beneficiaries from one school, and from one class posing challenges in establishing the real beneficiaries.

Record keeping by the CBC with regard to the applications and beneficiaries were inadequate. There were cases of complete lack of record in one year in respect with applications and disbursements, records showing schools and the number of beneficiaries without names, as well as non-accountability of unallocated funds. This impacted negatively on the level of transparency and accountability with which the CBC discharged its duties.

Findings also indicated that some students, perhaps owing to political connections, secured bursaries from more than one constituency, exploiting the absence of inter-constituency checks on the applicants. This practice was enhanced by religious leaders and the provincial administration who endorsed applications with little verification.

It also emerged that unsuccessful applicants were never communicated to. Neither did the CBC have any provision for appeals for the unsuccessful applicants. This scenario discouraged subsequent applications by the vulnerable children. In addition, it was found that against government guidelines, the CBC awarded bursary funds to a few students in private schools whose records the research could not verify due to suspicion from the management.

5.2.3 Impact of the Bursary Scheme on Equity in Access to Education

In terms of equity in access to secondary education, the study established that the bursary scheme did not enhance equity since a great amount of bursary was awarded to students in Provincial Schools majority of whom attended private academies for their primary education.

A common feature in the allocation mechanism was the element of inconsistency in supporting the needy. Only few cases had been assisted two and more times. This raises the question of efficiency. The begging question is “what happens to students who wholly depended on bursary for education?”

The inconsistency in support, especially among students from poor background, majority of whom attended District Schools made it difficult to assess the actual impact of the fund to students. The average 20% support they received as bursary towards their fees did not guarantee participation and, or completion of school. This in effect meant that their

academic programmes frequently disrupted, and subsequently their optimal performance would not be realized.

The study also established that in an effort to satisfy many applicants, the CBC awarded little amounts of money to many students that had little significant effect on their outstanding school fee balances. In many instances, a great gap existed between the amount applied for and the support received. The little amount offered, the failure to identify the needy, and the influence of political elites combined to deny the most vulnerable, access to the funds meant to alleviate their state.

The research also established that very few students in District Schools completed their fees payment. This impacted negatively on the quality of education services in those schools. The fact that students are measured by a common examination showed the degree of inequity in the provision of education services. In effect, the noble objective of enhancing equity in education provision was undermined as the fund had little impact to the target group.

In the light of the foregone discussion, it was concluded that the secondary school bursary fund was awarded to students regardless of their socio-economic backgrounds. Consequently, majority of children from poor backgrounds missed out on the kitty negating the noble purpose for which it was founded.

5.3. Conclusion

While it was agreed that the bursary facility had assisted some needy cases, the general perception was that beneficiaries transcended social classes. This tendency negated the noble purpose for which the facility was established. On average, only about 36% of the student respondents believed that the facility was benefiting the poor and the vulnerable.

It was also noted the bursary allocation mechanism was ineffective in targeting the vulnerable children, and in disbursing the funds to schools. In addition, the available guidelines from the MOE were flouted. As a result, the fund had had little impact on the majority poor especially in District schools.

It was concluded that for the fund to be responsive to the target groups, improvement was needed in the allocation mechanisms in terms of identifying needy cases. In addition, structural adjustment was required in the application and processing of funds and in the system of communication to the public for purposes of accountability and transparency.

5.4 Recommendations

In view of the findings and the implications thereof, the research recommended the following structural and management adjustments to realize equity in the allocation of bursary funds.

5.4.1 Targeting the vulnerable

- (i) To avoid a situation where the Head teachers, Provincial administrators and Religious leaders recommend funds for every applicant, the CBC should design a confidential form for comments on the financial ability of the applicants. Such comments would be objective as compared to comments on application forms which expose them to individual applicant scrutiny.

- (ii) To enable the CBC assess fully the needs of the applicants, part B of Form A should include specifications on the applicants' family sources of income, nature and type of residence, family assets and employment status of their parents.
- (iii) Proper records need to be kept with regard to the needy cases being supported. This would make the CBC to consistently support the disadvantaged throughout their course.

5.4.2 Realizing an Effective Allocation Mechanism

- (i) The CBC should set a definite calendar for the application of bursary to limit cases of late applications due to delayed communications.
- (ii) A register of applications should be kept, having been signed by the person submitting the forms for monitoring purposes.
- (iii) Names of applicants as well as those of the beneficiaries should be publicized to check against bursary awards to those who neither apply nor deserve and or to "ghost" students.
- (iv) The CBC should provide for appeals for the unsuccessful applicants to allow an opportunity to reassess their status. The presence of such structures would open avenues and raise hope to the disadvantaged with regard to their education opportunities.

5.4.3 Management of Funds

- (i) To ensure accountability, membership to the CBC should originate from the local people through an election to serve for 2 years with a possibility of re-election rather than appointment by the MP.
- (ii) Policy should clearly spell out the role of the MP as well as the terms of reference of the CBC to allow objectivity in the management of the funds.

- (iii) Civic education need to be conducted to empower the public to demand for transparency and accountability regarding the disbursement of funds.
- (iv) Stringent legal provisions need to be in place to protect the fund from cases of embezzlement and misappropriation and to outlaw students from receiving bursary assistance from more than one constituency.

5.4.4 Equity concerns

- (i) Education Management Information Systems (EMIS) need to be synchronized from the school level to the headquarters with the CBC to capture data on the socio-economic backgrounds of students and the bursary support. Such information will be crucial in guiding and monitoring the appropriation of bursary funds to the target group.
- (ii) A participatory monitoring and evaluation mechanism should be instituted for constant appraisal of the scheme to enable corrective measures to make the fund responsive by tracking down on the progress of beneficiaries to establish the impact thereof.

5.5 Suggestions for Further Research

- (i) A similar research should be conducted in other districts with different political environments for comparative purposes.
- (ii) A study should be conducted to identify loopholes in the SEBF allocation mechanism which make it prone to abuse.
- (iii) A study should also be conducted to establish the actual beneficiaries of the 10% bursary component of the CDF
- (iv) A study should be conducted to establish equity challenges that could be inherent in the FSE programme.

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APPENDIX A: A GUIDE FOR SAMPLE SELECTION

The table below provides a generalized scientific guidance for sample size decision

Table 11.3 sample size for a given population size

N	S	N	S	N	S
10	10	220	140	1200	291
15	14	240	144	1300	297
20	19	250	148	1400	302
25	24	260	152	1500	306
30	28	270	155	1600	310
35	32	280	159	1700	313
40	36	290	162	1800	317
45	40	300	165	1900	320
55	48	340	175	2200	327
60	52	360	181	2400	331
65	56	380	186	2600	335
70	59	400	191	2800	338
75	63	420	196	3000	341
80	66	440	201	3500	346
85	70	460	205	4000	351
90	73	480	210	4500	354
95	76	500	214	5000	357
100	80	520	217	6000	361
110	86	550	226	7000	364
120	92	600	234	8000	367
130	97	650	242	9000	368
140	103	700	248	10000	370
150	108	750	254	15000	375
160	113	800	260	20000	377
170	118	850	265	30000	379
180	123	900	269	40000	380
190	127	950	274	50000	381
200	132	1000	278	75000	382
210	136	1100	285	1000000	384

By Krejcie.R. &Moragn D. (1970). Determining sample size for research activities. Educational and psychological measurement. 30,607-610

APPENDIX B: LETTER TO RESPONDENTS

Dear Sir/Madam,

I'm a student in the School of Education, Department of Educational Management and Policy Studies, Moi University. As part of the requirements for my course, I'm expected to carry out a research study. I therefore request for kind response in the study *Equity Implications of the Secondary Education Bursary Fund*.

Get assured that your response will be treated with utmost confidentiality and will be used solely for the purpose of this study. **Please do not write your name** on any of these pages.

Yours sincerely,

Chris Mulumia J.M.
EDU/PGA/12/06
School of Education,
Moi University.

APPENDIX C: Questionnaire FOR SCHOOL ADMINISTRATORS

Part A: This part seeks background information regarding your school

Please indicate by a tick the appropriate response in the boxes given.

1. What is your position in the school administration
- Principal ()
- D/Principal ()
- Director ()
- Manager ()
2. How would you describe your school set up?
- Urban () Rural ()
3. Which of the following best describes your school category
- District () Provincial () Private ()
- Boys () Girls () Mixed ()
4. Indicate the number of your teachers
- a) Employed by TSC
- Nil ()
- 1-4 ()
- 5-8 ()
- 9-12 ()
- above12 ()
- b) Employed by BOG
- Nil ()
- 1-4 ()
- 5-8 ()
- 9-12 ()
- above12 ()
- c) Volunteers
- Nil ()
- 1-4 ()
- 5-8 ()
- 9-12 ()
- above12 ()
- 5).How many streams does your school have?
- One ()
- Two ()
- Three ()
- Four ()
- Above four ()

Part B: This part seeks your response regarding the current bursary allocation mechanisms. Kindly respond to all questions.

6).About what percentage of your student population do you think deserve bursary funds?

- Below 10% ()
 11-20% ()
 21-40% ()
 41-60% ()
 Above 60% ()

7).About what percentage of this receive bursary assistance yearly?

- Below 10 ()
 11-20 ()
 21-40 ()
 41-50 ()
 above 50 ()

To what extent do you agree with the following statements with regard to the socio-economic composition of the bursary beneficiaries? (Tick as appropriate)

Key strongly agree-SA; Agree-A; undecided –U; disagree-D; Strongly Disagree-SD.

Socio-economic background of beneficiaries

	SA	A	U	D	SD
8. The bursary beneficiaries are genuinely needy cases					
9. Beneficiaries are from poor backgrounds					
10. Beneficiaries are children affected by the HIV/AIDS					
11. Boys and girls benefit equally from bursary					
12. Students from diverse backgrounds benefit equally.					
13. Orphans are well catered for					
14. Beneficiaries are socio-politically connected					
15. Beneficiaries are from well off families					
16. Beneficiaries are perennial fee defaulters					
17. Beneficiaries are from illiterate backgrounds.					

Procedure for bursary application

	SA	A	U	D	SD
19. Application forms are accessible to students.					
20. The application process is easy and straightforward					
21. The process is time consuming					
22. Applicants cheat to get bursary					
23. Political influence determines the beneficiaries.					
24. Applications are processed in time					
25. Feedback on application is given in time					
26. Explanations are given to unsuccessful applicants.					
27. The CBC provides for appeals for unsuccessful applicants					
28. Bursary funds to schools are remitted in time.					

Impact of Bursary Awards

	SA	A	U	D	SD
29. Bursary awards are adequate to meet students' education needs.					
30. The fund has enabled the vulnerable to access secondary education.					
31. Bursary scheme has enhanced equality in education opportunities.					
32. Bursary has narrowed disparity in school infrastructural development.					
33. The bursary scheme has marginalized disadvantaged groups.					
34. Some students benefit from more than one constituency.					
35. Bursary funds have enhanced transition to secondary					
36. Bursary has narrowed disparity in educational access among socio-economic groups					
37. Bursary funds have enhanced student retention rates					
38. Bursary funds have enhanced completion rates.					

The following suggestions can be explored to strengthen the CBF. Indicate the level of priority you would give to each of them.

Scale: Very High-VH: High-H: undecided – U: Low-L: Very low-VL.

	VH	H	U	L	VL
39. Beneficiary representation on the CBC					
40. Stakeholder election of CBC Members					
41. Limitation of political patronage					
42. Increase funding					
43. Setting a definite calendar for applications					
44. Establishing management information systems.					
45. Institute monitoring and evaluation systems.					
46. Funds to be allocated at school level.					
47. publicize applicants and beneficiaries					
48. Management of funds by professionals					

49. Has your school ever experienced a problem with the (CBF)?

Yes () No ()

50. If yes, kindly state the problem (s)

.....

.....

.....

.....

51. How long did the CBC take to solve your problem (s)?

Immediate

1 day ()

1-2 days ()

3-7 days ()

over a week ()

not yet solved ()

52. What do you like most about the CBF? (Attach a separate paper if space not enough)

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

53. What are the things you do not like about the CBF?

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

54. Apart from CBF, what other organization (s) sponsors students in your school?

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

55. If any what do you find good in the way these organization (s) sponsor students

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

56. Is there any other issue you would wish to highlight on the Secondary Education Bursary Fund?

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

APPENDIX D**QUESTIONNAIRE FOR FORM 3 STUDENTS****Part A: Personal information**

Please indicate by a tick in the boxes provided

1. In which age range do you fall?

15-16 ()

17-18 ()

19-20 ()

21 and above ()

2. What is your gender?

Male ()

Female ()

3. What is your nationality?

Kenyan ()

Non Kenyan ()

4. What is your home constituency?

5. Which one of the following best describes the primary school you attended?

Public Day ()

Public Boarding ()

Private Day ()

Private Boarding ()

6. In which of the following range of marks does your KCPE mark falls?

Below 250 ()

250-300 ()

301-350 ()

351-400 ()

401-450 ()

Above 450 ()

7) Indicate your year of admission in this school.

2004 ()

2005 ()

2006 ()

2007 ()

Part B Family Background

Please tick in the boxes as appropriate

8).How would you describe your family?

Monogamous ()

Polygamous ()

Single Parent ()

9).Please indicates if your parents are alive.

All ()

One ()

Non ()

10).Which of the following best describes the number of your brother and sisters?

(Including your step brothers and sisters)

Nil ()

1-3 ()

4-6 ()

7-10 ()

Above 10 ()

11).How many of your brothers and sisters are at high school and college?

Nil ()

1-2 ()

3-4 ()

5-6 ()

Above 7 ()

12). Please indicate the highest level of your parents' formal education

Father ()

Mother ()

Primary ()

Secondary ()

College ()

University ()

13. What is the current occupation of your parents? (State the actual job and title)

Father.....

Mother.....

14. Please indicate any of the following assets owned by your parents (Tick all that apply)

Residential houses ()

Business premises ()

Farm ()

Commercial Vehicles ()

Machinery e.g. posho mill, tractor ()

15. If one of your answers to question 12 is farm, indicate the size of the farm

Less than 1 acre ()

1-3 ()

4-10 ()

11-20 ()

Above 20 ()

16. Please indicate the type of house your parents presently live in

Rental ()

Family Owned ()

Employer/Institutional ()

Others (please specify).....

17. Which of the following closely describes the nature of house owned by your parents?

- Grass thatched roof with mud walls ()
 Corrugated iron roof with mud walls ()
 Corrugated iron roof with stone/brick walls ()
 Tiled roofed house ()
 Timber house ()
 Others (specify).....

18. Which of the following utilities are available in the house your parents currently live?

(Tick all that apply).

Tap water, Electricity, Telephone and Internet

None of the above

- Only one ()
 Two ()
 Three ()
 All ()

Part C

This section seeks that your response on the secondary school bursary facility.

19. Indicate the source of finance for your education. (Tick all that apply)

- Parents ()
 Guardian ()
 Scholarship ()
 Bursar ()
 Others (specify).....

20. Have you ever applied for bursary?

- Yes ()
 No ()

21. If yes, how many times have you applied for a bursary?

- Once ()
 Twice ()
 Thrice ()
 More than thrice ()

22. About how much (Money) in total have you received as bursary since Form One?

Nil ()

Below 5000 ()

6000-10000 ()

11,000-15,000 ()

16000-20000 ()

Above 20,000 ()

23. Please indicate the number of constituencies that have supported you with bursary

None ()

1 ()

2 ()

3 ()

More than 3 ()

24. If no in Q. 20. Why haven't you applied for a bursary?

Do not know the procedure ()

Do not need ()

Forms are not available ()

Not sure of getting assistance ()

Other (Please specify).....

25. Which of the following best describes your current school fees balance (Ksh.)?

Nil ()

Below 5,000 ()

5,000-10,000 ()

11,000-20,000 ()

Above 20,000 ()

To what extent do you agree with the following statements regarding the bursary scheme?

KEY: Strongly agree SA; Agree A; Undecided U; Disagree D and Strongly Disagree SD

	SA	A	U	D	SD
26. Bursary fund have enabled most of us to learn					
27. I am forced to cheat in order to get bursary.					
28.I know where to get application forms					
29. Our head teacher recommends bursary for all of us					
30. We get feedback on our applications in time					
31. It is easy to appeal for more funds					
32. Most orphans in my school get bursaries					
33. The process of application is easy and straightforward.					

34. Please give suggestions on how well the constituency Bursary Fund (CBF) can serve students.

.....

.....

.....

.....

APPENDIX E: INTERVIEW GUIDE FOR OPINION LEADERS

1. Do the bursary awards target the vulnerable?
2. Who are the major beneficiaries of bursary?
3. To what extent is the bursary eligibility criteria observed?
4. How adequate are the funds in meeting the education needs of the target group?
5. Do you think the scheme has addressed the equity in access of education objectives?
6. Comment on the composition of the CBC.
7. What administrative challenges to the fund exist and how can they be addressed?
8. In what ways can the fund be strengthened to meet its objectives?
9. What alternative schemes may complement the bursary scheme in addressing equity in access objectives?
10. What recommendations/suggestions can you make for the improvement of the scheme?

APPENDIX F: RECORD CHECKING GUIDE

1. Total number of the 2007 Form 3 students in each sample school.
2. Marital status of parents.
3. Responsibility for fees payment.
4. Parents'/ guardians' occupation.
5. Total fees charged per year.
6. The nature and socio-economic composition of students.
7. Form 3 2007 bursary beneficiaries.
8. Fees status of the 2007 Form 3 bursary beneficiaries.
9. Bursary disbursed to the District since 2003.
10. Bursary awards in school categories since 2003.

APPENDIX G: LETTER OF INTRODUCTION FOR A PERMIT

APPENDIX



Tel: (053) 43001-8
 (053) 43555
 Fax: (053) 43555

MOI UNIVERSITY

P.O. Box 3900
 Eldoret
 KENYA

SCHOOL OF EDUCATION**REF: MU/SE/PGS/54****DATE: 18th October, 2007**

The Permanent Secretary
 Ministry of Education
 Science and Technology
 P.O. Box 30040-00100
NAIROBI

Dear Sir/Madam,

**RE: RESEARCH PERMIT IN RESPECT OF MULUMIA J. M. CHRISOSTYM-
 EDU/PGA/12/06**

The above named is a 2nd year Master of Philosophy (M.Phil) student at Moi University, School of Education, Department of Educational Management and Policy Studies.

It is a requirement of his M.Phil studies that he conducts research and produces a thesis. His research is entitled:

“Equity Implications of the Secondary Education Bursary Fund: A Case of Trans-Nzoia West District.”

Any assistance given to him to facilitate the successful conduct of his research will be highly appreciated.

Yours faithfully,

 A circular stamp of the School of Education, Moi University, is placed over the signature. The stamp contains the text "DEAN, SCHOOL OF EDUCATION" and "MOI UNIVERSITY".

 DR. I. N. KIMENYI

 for **DEAN, SCHOOL OF EDUCATION**


/db

APPENDIX H: RESEARCH PERMIT

PAGE 2 PAGE 3

THIS IS TO CERTIFY THAT:
 Prof./Dr./Mr./Mrs./Miss MULIMIA J. M. CHRISOSTYM
 of (Address) MOI UNIVERSITY
P. O. BOX 3900 ELDORET
 has been permitted to conduct research in.....
 Location,
TRANSNZOIA WEST District,
RIFT VALLEY Province,
 on the topic EQUITY IMPLICATIONS OF THE
SECONDARY EDUCATION BURSARY FUND: A
CASE OF TRANSNZOIA WEST DISTRICT
 for a period ending 31ST MARCH 2008

Research Permit No. MoST 13/001/37C 715
 Date of issue 30th OCTOBER, 2007
 Fee received SH 500


M. O. Ondieki
 M. O. ONDIEKI
 Applicant's FOR: Permanent Secretary
 Signature For PERMANENT SECRETARY
 Science and Technology
 MINISTRY OF EDUCATION
 SCIENCE AND TECHNOLOGY

APPENDIX I: RESEARCH AUTHORITY FROM THE MOEST

APPENDIX K

MINISTRY OF EDUCATION

Telegrams:.....
Telephone: Kitale 054-31653
Fax: 054-31109
When replying please quote
Ref:



DISTRICT EDUCATION OFFICE
TRANS NZOIA WEST
P.O. BOX 659,
KITALE

TN/ED/GEN/84/38

5th November, 2007

To Whom It May Concern:

MR. MULUMIA J. N. CHRISOSTYM is a student of Moi University of Eldoret.

He is hereby authorized to conduct research on **“Equity Implications of the Secondary Education Bursary Fund”** in Trans Nzoia West.

Kindly facilitate the exercise.

A handwritten signature in black ink, appearing to read 'Dunstan Pukah'.

Dunstan Pukah,
For: DISTRICT EDUCATION OFFICER,
TRANS NZOIA WEST DISTRICT.

/da.

APPENDIX J: RESEARCH AUTHORITY FROM DC TRANS NZOIA WEST

APPENDIX J

**REPUBLIC OF KENYA
OFFICE OF THE PRESIDENT**

Telegraphic Address:
Fax No: 054 - 31617
Telephone: 054 - 30720
When replying please quote



DISTRICT COMMISSIONER'S OFFICE
TRANS-NZOIA WEST DISTRICT
P.O. BOX 11
KITALE

Ref: No:ADM: 15/8/VOL.III/44

Date: 5th November, 2007

Malumia J. M. Chrisostym
Moi University
P. O. Box 3900
ELDORET

RE: RESEARCH AUTHORITY

You have been authorized to conduct research on "Equity Implications of the Secondary Education Bursary Fund: A case Study of Trans-Nzoia West District" for a period ending 31st March, 2008.

You are therefore advised to contact the District Education Officer for assistance.


(W. KINYUA)
FOR: DISTRICT COMMISSIONER
TRANS NZOIA WEST

DISTRICT COMMISSIONER
TRANS NZOIA

Copy to:

P. O. BOX 11,
KITALE

The District Education Officer
TRANS NZOIA WEST

**APPENDIX K: RESEARCH AUTHORITY FROM THE DEO TRANS NZOIA
WEST**

APPENDIX K

MINISTRY OF EDUCATION

Telegrams:.....
Telephone: Kitale 054-31653
Fax: 054-31109
When replying please quote
Ref:



DISTRICT EDUCATION OFFICE
TRANS NZOIA WEST
P.O. BOX 659,
KITALE

TN/ED/GEN/84/38

5th November, 2007

To Whom It May Concern:

MR. MULUMIA J. N. CHRISOSTYM is a student of Moi University of Eldoret.

He is hereby authorized to conduct research on **“Equity Implications of the Secondary Education Bursary Fund”** in Trans Nzoia West.

Kindly facilitate the exercise.

A handwritten signature in black ink, appearing to read 'Dunstan Pukah'.

Dunstan Pukah,
For: DISTRICT EDUCATION OFFICER,
TRANS NZOIA WEST DISTRICT.

/da.

APPENDIX L

FORM 'A'

MINISTRY OF EDUCATION, SCIENCE AND TECHNOLOGY
SECONDARY SCHOOL BURSARY ALLOCATION FORM (SESBAF)

YEAR _____

DISTRICT _____

DIVISION _____

LOCATION _____

SUB-LOCATION _____

PART A: STUDENT PERSONAL DETAILS

1. FULL NAME:

Last First Middle

2. Sex Male () Female ()

(a) Date of Birth Adm No

4. Name of school Class:

(a) For continuing students:

Year _____

Position in class: Term I ----- Term II ----- Term III ----- (Attach copy of report form)

(b) For those joining Form I:

School admitted: National Provincial District

(c) Total fees Paid/able to raise Outstanding Balance
Kshs Kshs Kshs

(d) Former Primary School Headteacher

Student/Pupil Conduct: Excellent V. Good Good Fair Poor

I declare that the above named is a former pupil of ----- Primary School
His/Her Conduct _____

Name _____

Signature _____

Date & School Stamp _____

FAMILY INFORMATION

(i) Are your parents both alive? Yes No

ii) Is your parent alive? Yes No
(for single parent)

(If not attach photocopies of death certificate or report from Sub-Chief)

Father's Name Occupation/Profession

Mother's Name Occupation/Profession

How many brothers and sisters do you have?

How many are working/in business

How many are in Secondary School?

How many are in Post-Secondary Institutions?

If both parents are not alive, who has been paying for your education?(Tick)
(for continuing students)

Guardian Sponsor/Well wishers

T B: INFORMATION ABOUT FAMILY FINANCIAL STATUS

GROSS INCOME IN THE LAST 12 MONTHS - (KSH)

	Father	Mother	Guardian/Sponsor	
GROSS INCOME				

Gross Income: (This means income from salary, business and farming)

APPLICANT'S SIBLINGS IN EDUCATIONAL INSTITUTIONS

CHILD'S NAME	NAME OF INSTITUTION	YEAR OF STUDY/ CLASS	TOTAL FEES	FEES PAID	OUTSTANDING BALANCE
GRAND TOTAL					

DECLARATION