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in the EFA FTI Partnership”

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**School Grants: *One* Efficient Instrument to Address Key
Barriers to Attaining Education for All**

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1. Background

1. This paper has been prepared as background for a discussion of *school grants* at the Capacity Development Workshop on “Country Leadership and Implementation for Results in the EFA-FTI”, to be organized in Cape Town, South Africa, July 16-19, 2007. The paper (i) discusses why school grants in the present education context in Sub-Saharan Africa (SSA) may be a particularly appropriate instrument for accelerating the progress towards quality Education for All (EFA) by 2015; (ii) provides a brief overview of the use of such grants in primary education in a few selected SSA countries, and (iii) summarizes some lessons learned from these countries.

2. School grants” represent a transfer of resources and spending authority from central, regional or district education authorities to local communities and schools. The grants are generally managed by the school director, a school council, parent-teacher associations and/or school management committees comprising representatives from these and sometimes other education stakeholders. The grants can fund particular school improvement programs prepared by the schools and approved by the Ministry of Education at the central or regional level, or they can be “capitation” or “block grants”, designed to provide resources annually to schools on a “per pupil” basis rather than based on an approved school-improvement plan. These grants may then be used by the school to purchase items included on a list of eligible items approved by the Ministry.

3. The coverage of the grants may vary from providing limited financing for some basic pedagogical inputs at the school level, to be more general, covering infrastructure, equipment and teacher development as well. In general, the objectives of school grants include: (i) improving the quality of education by providing resources for non-salary expenditures down to the school level, thereby addressing the severe shortage of resources for basic instructional supplies and materials as well as for operating costs; (ii) replacing various types of school fees paid by students to cover these types of expenditures; and (iii) enhancing effectiveness of resource use through more school-based management. This type of grants are allocated to schools and differ from conditional cash transfers to parents, aimed at encourage parents to send their children to school by covering some indirect/opportunity costs associated with school attendance. The latter type of grants will not be discussed in this paper.

4. While various types of school grants have been used over the last couple of decades, often in the context of donor-supported programs to channel resources directly to schools, there appears to be little rigorous cross-country evaluation of how effective different approaches are in reaching their objectives. The discussion in this paper is limited largely to summarize lessons learned from five country case studies prepared for a workshop on school fee abolition, organized jointly by UNICEF and the World Bank in Nairobi, April 5-7, 2006¹. The cases studies covered Ethiopia, Ghana, Kenya, Malawi and Mozambique. In addition, Tanzania participated at the workshop and its experience

¹ The five country studies along with a summary overview are currently being finalized for publication, see UNICEF/World Bank, 2007 (forthcoming).

with grants will also be reviewed, though no country study was prepared. The main objective of the Nairobi workshop was to learn from these countries with respect to two issues faced by countries abolishing school fees: (i) How can effective mechanisms be developed to replace the income at the school level collected through fees? and (ii) How to provide teachers, classrooms and pedagogical materials to cater to the enrollment surge resulting from fee abolition? The main interest of these cases studies in the context of the present paper is that five out of the six countries mentioned above used grants to replace the fee income at the school level.

5. Beyond the countries mentioned above, the paper also refers to experiences from some other countries, e.g., Cameroon, Lesotho, Madagascar, Zambia and Uganda as well as a few studies evaluating the use of school grants based on school improvement plans.

2. Use of school grants to ease key barriers on attaining the EFA goals

6. The use of school grants to address key barriers on reaching the EFA goals is of particular relevance to those responsible for preparing and implementing national education development plans designed to mobilize FTI support. Therefore, before reviewing the experience with school grants, we shall briefly highlight why participants at this FTI workshop may want to give particular attention to this instrument.

7. Studies show that the majority of SSA countries are under serious risk of *not* reaching EFA by 2015. However, it is worth noting that SSA's progress towards the 2015 targets will be much more positive than the assessment in such studies should the Region manage to maintain the remarkable resumption of enrollment growth experienced since the late 1990s. SSA's Gross Enrollment Ratio (GER) was above 91% in 2004, up from 79% in 1999. This represents a 25% increase in enrollment during this five-year period. This resumption of growth reflects rapid increase in access throughout SSA at a level not seen since the 1970s. This growth resembles more SSA's very impressive progress towards universal primary education (UPE) during the 1960s and the 1970s than the education stagnation experienced between the mid-1980s and late 1990s².

8. On this background, one of the most important contextual factors to note for those preparing EFA plans in the FTI context is: “What can be done to maintain and perhaps reinforce this renewed progress towards EFA?” An important part of the answer to this question is suggested by the fact that, on average, more than 90% of SSA's children of primary school age now enter school, but only 2/3 reach the final grade of the cycle and only about half of these master the expected basic skills primary education set out to teach them. Thus, over the last decade or so, the overarching challenge of reaching UPE has shifted from a general increase in admission to three interrelated challenges:

² Between 1960 and 1980, SSA's GER grew from 45% to 80%, and enrollment by some 260%, a level of growth hardly experienced over a 20-year period in any other region at any time. But the next 20 years were marked by stagnation. The GER declined from 80% in 1980 to 72% in 1992, and only slowly regained its 1980 level by 2000. The 70% enrollment growth during the period 1980 – 2000 was just sufficient to cater to population growth during this twenty-year period, leaving the GER unchanged.

- (i) Enrolling the last 10-15% of children who are still out of school. These are largely in rural areas and dis-proportionally from poor families. In particular, the number of orphans due to civil strife and, increasingly, HIV/AIDS is growing and may, in 2010, represent as many as one in every ten SSA children of primary school age;
- (ii) Improving learning outcomes, and
- (iii) Reducing dropout.

9. Three factors are particularly important in addressing these three challenges:

- (i) **Reducing the direct cost of schooling to parents:** An increasing number of SSA countries (a dozen are referred to in this paper) are doing this by abolishing various types of compulsory school fees paid by parents. While the amount of money collected through fees generally represents only a very small part of total education financing³, initial enrollment as well as retention at school of children from poor families is very sensitive to even very small fees. This is clearly demonstrated by the surge in enrollment in countries that have abolished fees. For example, the increase in total primary school enrollment the year following fee abolition in the five case-study countries was 12% in Mozambique, 14% in Ghana, 18% in Kenya, 23% in Ethiopia, and 51% in Malawi. Increase in Grade 1 enrollment exceeded by far this total increase for all grades. A similar enrollment surge in the year following fee abolition has happened in many other countries, e.g., 26% in total primary enrollment (59% in Grade 1) in Cameroon, 11% in total enrollment (75% in Grade 1) in Lesotho; 18% in Madagascar; 23% in total enrollment (43% in Grade 1) in Tanzania, and 68%% in total enrollment in Uganda. While other factors may also have played a role in explaining this surge, removal of fees is likely to be by the single-most important factors since the surge generally took place before any other measures accompanying fee abolition were implemented.

³ Very little data is available on the magnitude of fee income. In countries where all teachers are paid by the Government, the amount is likely to be small (less than 5 %?). However, in some SSA countries, parents do pay a major share of primary school teachers (and thus of overall education expenditures). This happens especially in rural areas where lack of public schools often leads parents to establish “community schools” and hire and pay the teachers fully or partially. For example, a study of 12 Francophone countries found that, around 2002, on average almost 1/3 of all primary school teachers were paid by parents, ranging from 3.8% in Niger to 67.5% in Chad (see Mingat 2004). Often this means that the poorest rural communities finance their children’s education, while better-off urban areas benefit from publically financed teachers. Also, teachers paid by parents received only about ¼ of the salary of government teachers. This, in turn, often means that these children have less qualified teachers than in urban areas. In Cameroon (not included among these 12 countries), despite the official elimination of school fees in year 2000, low public funding has resulted in that parents paid about 25% of public primary school teachers in 2002. These teachers were mainly in rural areas. If one adds that 23% of the total number of primary teachers is in private schools (only slightly subsidized), not far from half of all of primary school teachers in Cameroon are paid by parents, see World Bank/Pôle de Dakar (2003). In 2006, Cameroon received a grant from the FTI Catalytic Fund to help pay these teachers. In the DRC households finance as much as 80-90% of expenditures in public sector education institutions, see World Bank (2005).

- (ii) **Improving the quality of instruction.** Essential pedagogical materials and supplies are in very short supply in most primary schools in low-income SSA countries. In addition, other support for teachers, such as in-service training and pedagogical advice, is also very limited.
- (iii) **Management at the school and classroom level.** Studies show that there on average is little relationship between learning outcome and resources allocated to schools, suggesting a need for improving the effectiveness of resource use at the classroom and school level⁴.

10. In summary, school fee abolition is increasingly used as a means of reducing cost barriers on families to enroll and maintain their children at school, and school grants are generally used as the a main instrument to replace – and often increase -- the income collected at school level through fees. Staff involved in preparing education development plans for FTI endorsement need to be fully aware of both the major impact school fee abolition generally has on human, physical and financial requirements and, thus, on the financial sustainability and realism of such plans, *and* of what it will take to develop successful grant schemes to replace school fee income at the school level.

3. School grant schemes in selected countries: Rationale, size and management

11. As already underlined, the main objective of the five country case studies was to study the impact of fee abolition. Annex 1 summarizes some key aspects of the findings in this regard. Since studying school grants was not their principle objective, the case studies only describe briefly the use of grants to replace the income collected at the school level (four of the five countries used grants for this purpose)⁵. In addition to these four countries, the below summary includes information on the use of grants in Madagascar, Tanzania and Uganda.

3.1 Rationale

12. This section summarizes the main rationale for school grants in five countries.

- (i) **Ethiopia** issued in 1994 a new Education and Training Policy which stipulated that Grades 1-10 should be fee-free, and annual block grants from regions to districts (*woredas*) were established to replace existing fees. The schools are required to prepare annual plans submitted to the *woreda* councils, and the regional governments provide the *woredas* their annual budgets in a lump sum based on three criteria: population size, socio-economic indices and efforts made to generate revenues. The main purposes of the block grants are to ensure that:
 - (a) schools have the minimum resources needed to conduct the teaching and

⁴ See Mingat (2003).

⁵ In Malawi, the Government was to provide all learning materials, teachers, classrooms, school furniture, teachers' houses, sanitation facilities, and boreholes and was also to finance "unassisted schools". One key reason why the initial enrollment success of fee abolition in Malawi was not maintained was that the Government was not able to provide these resources to respond to the 51% increase in total enrollment (59% in Grade 1, 76% in Grade 8) between 1993/94 and 1994/95 resulting from the fee abolition.

learning process; (b) the grant resources are distributed to schools on an equitable basis, and (c) with the help of the grant, the community's sense of ownership of the school is further enhanced.

- (ii) **Ghana** introduced free Compulsory Universal Primary Education (fCUBE) in 1996⁶. However, the policy did not have the expected positive impact on new enrollment. Studies conducted in 2004 showed that this was partly because some fees were still charged by communities and parent-teacher associations. Some such fees were legal under fCUBE, subject to approval by District Assemblies, though the assumption had been that "... no child shall be sent out of school for failure of his/her parents to pay such levies/fees"⁷.

To address this problem, the Ministry of Education (as part of a World Bank-financed program) started in the 2004-05 school year to pilot fee-free primary education in the 40 (later 53⁸) most deprived districts. A capitation grant scheme was introduced to replace fees income, to be spent by schools in accordance with approved Performance Improvement Plans. While initially limited to these 53 districts, the implementation coincided with complaints from civil society groups about the country's inability to fulfill its pledge under the fCUBE to achieve free, compulsory and universal primary education by 2006. In response to this pressure, and because the grant scheme had led to above average increases in enrollment in the 53 pilot districts, and many other districts introduced similar schemes on their own, the Government decided to extend the capitation scheme to all primary education schools as from the start of the 2005-06 school year.

- (iii) **Kenya** introduced free primary education (FPE) at the start of the school year beginning January 6, 2003, fulfilling an electoral pledge made by the NARC (National Rainbow Coalition) that gained the December 2002 election⁹. The main objective of the FPE policy was to reduce the cost of education to parents and to avoid that school fees prevented children from attending school. Capitation grants were developed to replace the income schools collected through fees. "One of the hurdles faced right from the beginning by the Ministry was how to implement FPE immediately, given that there was no plan and budgetary allocation in place prior to the announcement since it came in the middle of the

⁶ Already in 1961, Ghana made primary school (six grades) and middle-schools (four grades) fee-free and compulsory. This led to a staggering 113% primary school enrollment growth in five years, resulting in the Gross Enrollment Ratio (GER) increasing from 59% in 1960 to 106% in 1995. Unfortunately, economic conditions worsened, and enrollment hardly increased between 1965 and 1970, resulting in the decline in the GER, which was only 72% in 1975 and remained below 80% until around 2000.

⁷ See Ghana Case Study, p. 18, of UNICEF/World Bank, 2007 (forthcoming).

⁸ The increase from 40 to 53 districts is explained by the fact that the total number of districts in Ghana was increased from 110 to 138 through the splitting up of some districts. Thus, the original 40 became 53.

⁹ Also Kenya experienced strong enrollment growth after independence in 1963 and especially after the abolition of school fees in 1974 in Grades 1-4, resulting in a near tripling of Grade 1 enrollment. In 1978, fees were also abolished in Grades 5-7. As a result, Kenya reached a GER of 104% in 1975, and the GER stayed above 100% until 1989. It then declined to fluctuate around 90% in the 1990s until fee abolition in January 2003 when the GER jumped from 88% in 2002 to 102.8% in 2003 and further to 104.8% in 2004.

financial year”¹⁰. In order to define the scope of the support to be provided to schools, the Ministry established a team tasked to define “...the legitimate expenses for primary schools... Any other expenses which were perceived to be unnecessary were left out. The expenses identified as key included: provision of instructional materials, support staff wages, repairs, maintenance and improvement of school structures. The net effect was to remove the financial burden from households” (*op. cit.*, p.6).

- (iv) **Madagascar** introduced school grants in school year 2002-03 as part of the abolition of school fees. Grants are given to both public and private school, and are used to finance a limited amount of education supplies and small repairs. In addition, district offices provide instructional materials not covered by the grants. Madagascar also has another school-based grant for community teachers. The grants aim to help reduce demand constraints on school attendance, improve the quality of instruction, and strengthen school management and accountability.
- (v) **Mozambique** launched in March 2003 a Direct Support to Schools (DSS) program comprising small grants to schools. The program’s two main objectives were to: (a) decentralize decision making and resource management by empowering school councils to decide on and ensure transparency and accountability in the use of funds; and (b) enhance education quality by increasing the supply of basic learning materials and stimulating the involvement of the community in the life of the school. The DDS has been implemented in phases, and Phase 5 was under way when the case study was done in 2006. Phases 1-3 were limited to the first cycle of primary education (EP1 covering Grades 1-5). Phase 1 included training of provincial and district directors, and school management, opening of special DDS bank accounts, and various types of training and information materials were developed, printed and distributed. Schools were authorized to draw money from the DDS bank accounts, and the decision to choose among the items on the list of eligible items was delegated to school councils. Phase 2 extended the list of eligible items, while Phase 3 continued training and added a new activity -- de-worming -- in two selected provinces. A massive information campaign about the DDS program was conducted (over five weeks in regional radios in Portuguese and 14 local languages, and in newspapers). Phase 4 extended the program to include the second cycle of primary education (EP2 covering Grades 6-7), the de-worming program continued in EP1 schools while a school health and HIV/AIDS program was piloted in all EP1 and EP2 schools in three provinces. Finally, Phase 5 piloted two approaches to reach orphans and vulnerable children in three provinces.
- (vi) **Tanzania** has gone through different stages of providing grants to primary and secondary schools¹¹. A “Community Education Fund” (CEF) was introduced in

¹⁰ See: Kenya Case Study (p. 5) of UNICEF/World Bank, 2007 (forthcoming).

¹¹ Also Tanzania had introduced free primary education before (in 1974). As a result, the apparent intake rate to Grade 1 increased from 56% in 1974 to 98% in 1975, 110% in 1976, and 168% in 1978. Severe

1998 under a World Bank-supported program to support implementation of school improvement plans developed by communities¹². The CEF was designed to match funds mobilized at the community level with a government grant. While the CEF was quite successful, the poorest communities and weakest schools were not sufficiently reached, mainly due to their inability to mobilize the funds needed to receive the matching grants, weak school management, inexperienced community organizations, and bureaucratic rigidity in matching community contributions. The Government therefore developed more targeted programs to address these problems. However, despite the overall success of the CEF, the poorest communities and weakest schools still struggled to implement their plans.

In January 2002, capitation as well as school development grants for primary education were introduced under a World Bank-supported program. The former financed school materials and other recurrent inputs identified in plans prepared and implemented by school committees under the supervision of wards and districts, and approved by the village councils¹³. The latter supported both rehabilitation and building of new classrooms. In 2004, similar grants were developed for secondary education under a new World Bank-supported program.

- (vii) **Uganda**¹⁴ introduced “Free Primary Education” in 1997. School fees levied on parents were abolished and replaced by capitation grants from the government. The grant system was part of the Uganda’s decentralization process. In addition to lowering education costs to parents, the grant system aimed to provide “...(i) full community participation and decision making without making unrealistic and unfair demands on the poorest; (ii) decentralized procurement which maximizes use of local expertise and (iii) targeting the poorest communities through a system of ranking and prioritizing neediest schools” (*op. cit.* p. 244).

3.2 Size of grant

13. There is quite a wide range between the above seven countries listed above in terms of the size of the capitation grants allocated per student:

- (i) **Ethiopia**: The minimum size of the block grants from the *woredas* to schools was recommended in government guidelines issued in 2002 and 2003. At that time, the annual grant per student was 10 “Birr¹⁵” for grades 1-4, 15 Birr for grades 5-8, and 20 Birr for grades 9-10. The Ethiopian case study says that “...these recommended minimum figures seem to match the annual school fees

constraints on public budgets hampered the Government’s ability to provide teachers and classrooms for the surge, causing a gradual decline to 83% in 1980 and around 75% during most of the 1990s. The sharp increase in enrollment between 1974 and 1978 lead the GER to peak at about 100% in 1981, a level that was only reclaimed in 2003 as a result of Tanzania’s recent rapid primary enrollment growth.

¹² The description of the CEF is based on ADEA (2005), p. 245.

¹³ The description of the capitation grant for primary education is based on appraisal documentation for the World Bank credit supporting this program.

¹⁴ The summary and citation are based on Naidoo (2005).

¹⁵ In August 2004, 1US\$ = 8.45 Birr

that used to prevail”.¹⁶ However, the study also notes that some woredas did not strictly follow the recommended grant level and pay less than recommended “...due to presumably resource limitations” (*op. cit.* p. 24).

- (ii) **Ghana:** The size of the grants in Ghana was the equivalent of US\$2.70 for boys and US\$3.88 for girls. According to the Ghana case study, the “fee level and charges were lower (in Ghana) than elsewhere as much of the cost of education were borne by government as a result of the fCUBE”, (*op. cit.*, p. 6). For example, the fCUBE policies stipulated that textbooks should be supplied free of charge to Grades 1-6 of both public and private schools, while pupils in Grades 7-9 would pay textbook user fees not exceeding 10% of the average total costs of textbooks supplied to them. This would help explain the comparatively low grants in Ghana compared to Kenya and Tanzania.
- (iii) **Kenya:** The size of the grant was fixed in January 2003 at the equivalence of about US\$14 per pupil. This was considered the very minimum needed for running schools and for providing the minimum teaching and learning materials required. The grant was split into two “accounts”. The first (about 2/3 of the total grant) covered instructional materials and supplies, and the second (about 1/3 of the grant) covered various non-instructional school expenses, including basic maintenance, transport, electricity, water, postage and telephone. Note that the funds for instructional materials aimed at achieving a textbook pupil ratio of only 1:2 in upper primary education and 1:3 in lower primary.

According to the country study: “The capitation grant was by no means a replacement of all the lost revenues due to abolition of fees, as most of them were unnecessary” (*op. cit.*, p. 6). In fact, some school management committees were reluctant to adapt the free primary education (FPE) policy since they had “...previously benefited from school fees and levies which were not properly accounted for. For this reason, most of them opposed the abolition of levies whose use was under their control. There was no mandatory book keeping prior to the introduction of FPE. Members of school committees held strong belief that the capitation grants received from the Government would not be adequate to meet all school requirements. Consequently, some schools experienced cases of committee members resigning” (Kenya Case Study, p. 20). The study also observes that in most urban areas, the size of the capitation grant is considerably less than what schools had received from school levies. Finally, the study stresses the need to ensure that the size of the grant is adjusted over time to account for inflation (this point is also made in the Ghana study¹⁷).

¹⁶ *Op. cit.*, p. 24.

¹⁷ This aspect is stressed as well in an earlier experience for Ghana where one of the lessons learned from a cash-matching grant scheme under the Community Initiative Project was that “During periods of high inflation it is essential to make prompt payments to communities and to adjust grant levels (in the local currency) frequently”, see Bray (1995).

- (iv) **Madagascar:** At the time of introduction in 2002-03, the capitation grant for school supplies and repairs was the equivalent of US\$ 1 per pupil. This year, it has been decided to raise this to \$ 2 per pupil.
- (v) **Mozambique:** The case study does not specify the amount per pupil. Based on the global data provided, the allocations in Phases 1-3 appear to range between the equivalent of about 0.60 to 0.90 US\$ per pupil, increasing to about US\$ 1.20 in Phase 4. In Phase 1, each school received on average about US\$ 200 in two half-yearly disbursements, depending on the number of students and shifts. The funds were to cover training materials for pupils and teachers chosen according to a list of eligible items prepared by the Ministry of Education (notebooks, textbooks, library books, pencils, pens erasers, dictionaries, chalk, blackboards, maps, cupboards with locks to store books, etc). In Phase 2, on average about US\$300 was distributed to the schools and in Phase 3 about US\$270, ranging from US\$170 to about US\$2,800 depending on the number of pupils and shifts. In Phase 4, about US\$ 4.1 million was transferred to schools with about 71% for school materials and 29% for school health and HIV/AIDS-related activities.
- (vi) **Tanzania:** The amount provided by the Government through the CEF as “matching grant” depended on the amount raised by the community, though the Government’s “matching ratio” was higher for the weakest schools. The capitation grant introduced in 2002 was the equivalent of US\$10 per pupil, including \$4 for textbooks and \$6 in support of other teaching and learning materials, school operations and administration, and cluster-based teacher professional development.
- (vii) **Uganda:** The size of the grant is determined centrally and the funds are released as a conditional block grant to districts which, in turn, releases all funds to schools based on enrollment. The Ministry of Education developed guidelines to schools for how the funds should be used, e.g., 50% for pedagogical materials, 5% for administration, etc. The grant provided the equivalent of about US\$4 per year per pupil in Grades 1-3 and US\$6 for Grades 4-7. The grant size has remained unchanged since it was introduced though an increase is now being considered. The Government has a separate budget line for instructional materials and textbooks are provided free of charge. The books titles are vetted and approved nationally and the schools place orders based on the national approved list. The Government is planning to scale up to the national level a scheme for decentralized instructional materials procurement that has been piloted.

14. In summary, the size of the capitation grant per pupil varies considerably between these countries. In the cases where the grants were designed to replace fees, attempts were made to match the size so that the grant would replace the income schools collected through fees. However, it is clear that the fee income in general only sufficed to cover some minimum basic training material and operating costs. Indeed, in the case of Ghana and Mozambique, the capitation grant was initially aimed at providing schools with some basic education inputs, not to replace fees.

15. In cases where the main objective of school grants is to provide schools with resources for basic learning materials and operating costs it seems appropriate to explore how much resources would be needed if the role of capitation grants is extended beyond just replacing the money collected from “legally approved fees” to providing schools with the non-salary recurrent expenditures needed to acquire an essential package of non-salary education inputs and basic operating costs. This is clearly the approach followed in Kenya and Tanzania, but is also present in the other case study countries as well as in many other countries where different types of school grants have been used to promote quality improvement at the school level¹⁸.

16. UNICEF has promoted the idea of providing each pupil with an “Essential Learning Package”, and has conducted studies to estimate what a reasonable per pupil allocation would be to provide such a package. The FTI “Indicative Framework” proposes that 33% of recurrent expenditures be spent on non-salary inputs¹⁹, and van Uythem and Verspoor (2005, pp. 293-321) provide an extensive analysis of what this level of expenditures could imply under different assumptions in terms of recurrent expenditures per pupil. In particular, they quote a study (Rasera 2003) that defines a list of “basic inputs” needed at the school level to obtain education of acceptable quality, estimating first a “minimum level of inputs”, and second a “desirable level of inputs”. The unit cost (as estimated by Rasera) for the former is in the order of \$16 to \$19, and \$33 to \$37 for the latter.

17. Van Uythem and Verspoor estimate that the \$16-\$19 level would be of the order of magnitude implied by the 33% recurrent costs for non-salary inputs suggested by the FTI “Indicative Framework”. They also review how various ways a part of this can be financed through more efficient use of existing resources, and conclude that while considerable scope for efficiency gains exists:

“...there is an important timing issue, since the boost to non-teacher salary recurrent spending has to take place well before the quality improvements from it will take their full effect. The increased provision of quality enhancing material inputs with an estimated cost of \$16 per student (of which an estimated \$10-12 would be additional expenditures) is needed now to support immediate improvements in instructional

¹⁸ There is considerable experience throughout the world in the use of competitive school grants to promote quality improvement through “school improvement projects”. The grants typically provide financing for school development plans prepared by school staff, community management committees or school boards. As pointed out by Van Uythem and Verspoor (2005, p. 317), the challenge with such grants is to ensure that poor communities with poorly resourced schools can participate fairly. Robert-Schweitzer et al. (2002) analyzed school development grant programs in 37 World Bank supported projects (16 in SSA), supported under World Bank-financed education projects between 1991 and 2002. That study concluded that by providing funding directly to the school, grants “...work to empower schools and their communities to improve education, create a better climate for learning and as part of systemic education change, create conditions for improving retention and enrollment in the long term” (*op. cit.*, p. 19).

¹⁹ See Bruns et al (2003).

practices, which can then bring about the efficiency gains (later in the period up to 2015)”, *op. cit.*, pp. 300-301.

18. Given the severe shortage of printed training materials in most SSA countries, inclusion of the financing of textbooks in capitation grants schemes needs to be given particular attention. Also, given the comparatively high cost of textbooks in SSA the size of the grant will depend crucially on whether or not textbooks are included in the grant or provided separately. For example, the average cost per textbook in primary education in Kenya is about US\$3, and about 35% of the grant was used for textbooks although the target textbook ratio in the five core subjects was only one book to two pupils in upper primary school and one book to three pupils in lower primary school. In fact, several elements of the “textbook chain”, i.e., the development, printing, procurement, financing, distribution and use of textbook at the classroom level are affected by whether the procurement of textbook is made by the school or through centralized systems. Serious studies need to be conducted at the country level to establish the pros and cons of centralized versus decentralized, school-based textbook procurement systems²⁰. However, to discuss this important topic goes beyond the purpose of the present paper.

3.3 Implementation/management/monitoring

19. This aspect was handled differently depending on national circumstances. In countries where school grants were tested on a limited scale prior to generalization (e.g., Ghana, Mozambique), efforts were made to develop the implementation, management and monitoring capacity needed prior to going to scale. In countries where school grants were introduced to replace income from school fees as part of a school fee abolition policy launched as part of an election campaign (i.e., the “big bang” approach to school fee abolition followed in, e.g. Ethiopia, Kenya, Malawi and Uganda), much of this work needed to be done as part of implementation. However, as indicated below, even some these countries (e.g., Kenya) had tested important aspects of the implementation mechanism prior to introducing the school grant scheme.

- (i) **Ethiopia:** The case study does not go into details about how the grants are managed at the school level, noting only that the relevant Government directive delineates the responsibility between the district (woreda) office and the school. As part of the ongoing decentralization in Ethiopia, non-salary recurrent expenditures is managed at the school level while capital and salary expenditures are managed by the woredas.

²⁰ Without being able to analyze the reasons for the cost difference here, it is interesting to note that textbooks generally are much less costly in many developing countries in Asia than in SSA. For example, India generally procures low-cost textbooks centrally at the state level and distributes them to schools. In Vietnam, a primary school textbook costs US\$0.30 to US\$0.60. About 80% of the pupils buy the books, the remaining 20% living in deprived areas get free books. The textbooks are developed centrally, but printed through a partnership with the private sector (printing is by private printers through competitive bidding, but using paper purchased in bulk by the Government through a competitive process). This comparatively low cost of textbooks, combined with generally much smaller family size, are factors that make cost recovery for textbooks much more affordable in low-income Asia than in low-income SSA countries.

- (ii) **Ghana** made a number of arrangements to assure the success of the school grant scheme, e.g., setting up a joint committee of senior officials from the ministries of education and local government to address institutional impediments, development of guidelines based on experiences from the pilot scheme, conducting training programs to build staff capacity, and building monitoring systems to promote accountability of fund use. As regards the flow of funds to the schools, central government put the grant in a central bank account from which checks were issued to specially designated capitation grant bank accounts in each district based on their enrollment. These resources were then transferred to individual school bank accounts (in most districts, the schools' accounts are kept in the same bank as that of the district office). The signatories of the school accounts are the head master and his/her assistant. Funds are transferred to schools in tranches during the school year, starting with 50% at the start of the year, and based on projected enrollments. Subsequent transfers during the year are contingent on submission of "adequate" data on actual enrollment.

Key players in grant management at the school level include district officials (district director of education, supervisors and accountant), the school management committee (SMC), and the head teacher. Monitoring mechanisms have been established to ensure transparent disbursement, fund use, record keeping, reporting and auditing. Request and use of funds are to be endorsed by the head of the school and the SCM. The school keeps records of receipt and use of funds, to be reviewed by the SMC, the District Education Office and the Audit. Monthly and quarterly reports are issued on fund use, and monitoring functions are performed by various district officials as well as through half-yearly audits. The Ghana case study conclude that implementation of the grant scheme has been quite smooth except that head teachers have complained of too much additional work in the areas of preparation of School Performance Implementation Plans and documentation on disbursements (*op. cit*, p. 23).

- (iii) **Kenya:** The capitation grants were disbursed directly to schools, in two separate bank accounts, one for school materials and one for operational and maintenance expenditures. Both accounts are managed by the SMC which comprises the head teacher as secretary and elected members among parents and teachers. One parent not member of the SMC is a signatory of the account for school materials to ensure transparency and accountability in fund use. The funds are transmitted electronically twice a year by the Ministry of Education. Prior to releasing the first transfer of money to schools, the government conducted training and sensitization of primary school headmasters and as well as of the chairpersons and treasurers of the SMCs. The government also provided procurement and financial management manuals, institutionalized the monitoring of fund utilization, enhanced the capacity of its school audit unit, and made it mandatory for primary school accounts to be audited annually. In addition, parents and communities were empowered to demand how funds were used, and the accounts were displayed on the boards for perusal by the stakeholders.

The Ministry of Education also negotiated with commercial banks concessionary services to all the 18,000 public primary schools. This included waiving of most bank charges including free issuance of bank balances to the ministry for the purpose of monitoring fund use. This was an important measure to reduce costs of operating the grant scheme²¹. Also, for the training material account, no cash withdrawals were allowed, and all payments to merchants had to be done by check. The combined effect of these measures helped ensure the transparency and credibility of the utilization of the grant funds.

The introduction of the grant scheme in Kenya benefited greatly from prior testing of decentralized funding which started in two districts in 1996 (with support from the Dutch Government). This pilot was later extended (with support from DfID), resulting among others in both the piloting of bank accounts at the school level and in the development of a national textbook policy for primary schools. This means that Kenya already had developed a scheme whereby schools could buy textbooks from local book sellers, selecting from a list of titles approved by the Ministry. Also, UNICEF had already been supporting a scheme by providing training materials to schools, and the World Bank rapidly approved a US\$50 million IDA grant to help finance provision of training material.

- (iv) **Madagascar:** The grant for school materials and repairs is managed by a school level association which includes representatives from the local administration as well as parents. Some implementation problems have been encountered, related for example to delays in budget execution. These have partly been caused by difficulty in getting the accounts required by the budgetary process which, in turn, are partly due to the time-consuming nature of the process. In fact, in order to enforce accountability, the rigor of the process has been reinforced. Given the small amounts received -- especially by small schools, this may cause questions as to whether the benefits of small grants match the transaction costs involved.
- (v) **Mozambique:** As described above, the DDS program was introduced in phases. The results of each phase were monitored and fed back into the design of the subsequent phase. Following the training of provincial and district directors, special school grant bank accounts were opened in the name of the latter. The School Council, comprising teachers, community representatives, the school head master and the district education director decides on what to buy based on a list of eligible items prepared by the Ministry of Education.

The Mozambique case study provides more details on monitoring than the other studies. Phase 1 monitoring²² found immediate positive impacts of the grants, e.g., pupils participation in the classrooms had improved, they had pencils and notebooks, were able to do more homework, and absenteeism and dropout

²¹ Though not mentioned in the country study, waiving of bank charges on school bank account was also negotiated in the case of Ghana.

²² The study refers to "interviews", but no further information is provided on the monitoring instruments.

appeared to have been reduced. The poorest children whose families could the least afford to buy materials benefited the most. Furthermore, transfer of money through bank accounts proved to be efficient, and the interaction between school and community had been strengthened. The assessment recommended strengthening of some managerial and administrative aspects and also that the grant amount allocated to schools should vary according to school size and that additional criteria needed to be developed for support to orphans. Phase 2 took into account these recommendations, and the assessment of that phase showed further increased appreciation of the grant scheme.

The monitoring of Phase 3 confirmed the positive impact of the grants, especially with respect to more training material available at the classroom level, and in facilitating the enrollment of vulnerable children. The monitoring showed a wide variation among schools both in the selection and decision making process followed with respect to what the grants were used for as well as to who benefited from the material. In the majority of cases, the process was organized in a fully participatory manner between the school director and school council. Finally, the case study observes that, at the classroom level, an increase in motivation of learners was observed due to the direct benefit of the school materials.

- (vi) **Tanzania:** The school grants are channeled through bank accounts held by the school councils. Also Tanzania introduced the capitation grant in a phased manner. At the initial stage, US\$4 (out of the total US\$10) was distributed to the district level in line with the Government's phased textbook decentralization program. Eventually, all schools were to receive \$10 per students when they start to manage the purchasing of textbooks themselves. In order to adequately prepare the districts for development of school plans, management of the grants and to test the system, disbursement of the remaining \$6 were planned in two phases. In the first phase (starting in January 2002), US\$ 3 were provided to all schools to cover essential operating costs. The reminding \$3 were provided once schools had submitted acceptable annual plans and budgets, respecting the guidelines agreed upon at the district and central levels.
- (vii) **Uganda:** SMC manage the money at the school level. Workshops were conducted to train and sensitize all actors on the rules and guidelines of record keeping and accountability. Monitoring showed that, at first, there were problems with the grants reaching schools in time²³ and parents' perception that they were not adequately involved in the SCMs. To address this, the amount of money received by the schools is posted in the schools and regular audits are conducted to ensure that funds reach the schools and are used as intended. Overall, the grant program has proved an effective means for the participation of parents in the decision making in the education sector.

4. Pros and cons of using school grants.

²³ Source: ADEA (2005), p. 244.

20. As already indicated, there does not appear to be many rigorous evaluation studies of school grants and the discussion in this section is limited to briefly summarizing observations made in the four case studies, supplemented by some conclusions from other countries mentioned.

4.1 Advantages of capitation grants. These include:

21. The **Ghana** study concludes that the use of capitation grant is a pro-poor strategy since "...especially the poor have decided to enroll their children in school. The study also concludes that using capitation grants is a relatively simple and cost-effective strategy for achieving an immediate and considerable impact on access to education. The approach also created a lot of national momentum and additional support for education from e.g., faith-based organizations, the private sector, district assemblies and local members of parliament. This added support helped the implementation by creating a multiplier effect. Interestingly, the Ghana case study also concludes that the higher grant for girls than for boys in the pilot did not have a significant impact on narrowing the gender gap as compared to the national implementation of the grant scheme where the grant was not differentiated by gender. On this aspect, the case study concludes that: "A multi-sectoral approach is required as many of the causes of low enrollment of girls are not necessarily within the domain of the Ministry of Education. Changing attitudes and culture requires interventions that are specifically targeted" (*op. cite*, p. 7).

22. The **Kenya** study underlines that the accounting at the school level related to the grant mechanism has ensured transparency and accountability of resources as it is mandatory for schools to display on their boards all receipts of the grant funds and expenditures. Availability of textbooks and other training materials has enhanced access and retention in primary schools. To enhance access in sparsely populated areas, the government has also used the grant scheme to support low-cost boarding primary schools, and to increase the availability of training materials at non-formal schools.

23. The **Mozambique** study emphasizes that the grant scheme has enabled communities and schools to decide on what needs to be done to improve quality, has revitalized school councils, and has helped promote local-level accountability and solutions. In turn, this local empowerment has contributed to improving quality and administrative efficiency as well as a stronger constituency for education. The monitoring of the implementation of the grant scheme has produced very useful information that has both helped enhance the scheme's impact, and shown the importance of ensuring that the scheme is fully integrated in the overall sector program. More generally, this illustrates the fact that, in addition to providing essential education inputs, the objectives of the grants schemes included promoting closer cooperation between, and empowerment of, schools and local communities, revitalizing school councils, accountability of schools for use of money and learning outcomes, etc. In turn, these types of factors are essential ingredients of a comprehensive strategy for quality improvement. For example, all of the seven "pillars of quality improvement" identified in Verspoor (2004, pp.324-337), include interventions directly related to the type of benefits school grants stimulate.

4.2 Pre-conditions for success.

24. While the lessons learned with respect to what it takes to ensure the success of capitation grant schemes vary by country depending on the national context, there are many similarities among the key actions taken. These include:

- (i) A reliable school registry/school map needs to be available to ensure that all eligible schools get their grant, and enrolment data need to be reliable to establish the magnitude of the grant for each school;
- (ii) Simple implementation guidelines need to be developed, and local education officers, head teachers and school management committee members need to be trained in their application;
- (iii) All cases studies stress as essential for success the existence of an effective financial system for resource transfer from the central level to schools and of bank accounts and of transparent fund management at the school level. This requires transparency in how much money is received and accountability for how they are used, cooperation and trust between school management and communities, and financial management capacity at the school level.

4.3 Further challenges/questions.

25. Most SSA countries are still in the initial stages developing effective capitation grant schemes, and many challenges remain, including:

- (i) Ensuring financial sustainability. In many countries, the school grants have been initiated through external financing. It is important that the resources needed to maintain grant payments to schools in a reliable and timely manner be included in the national budget process. This is especially important as countries seem to move towards increasing the use of grants to cover more of the resources needed at the school level to finance essential pedagogical materials and operating costs;
- (ii) Coverage of grants. Sustainability is closely related to the size of the grant. As shown in the above discussion, the size varies considerably by country, depending *inter alia* on what is covered. Several issues arise in this regard, including:
 - Whether or not the capitation grant includes financing of textbooks. To achieve the EFA goals will require radically improved availability of e training materials in most SSA countries. School grants may be *one* effective instrument of providing resources to acquire such material at the school level. However, as already mentioned, to use this instrument require many pre-requisites, such as bank accounts at the school level, an efficient way for schools to acquire affordable training materials, and transparent management of grant funds at all levels. Schools in many countries, including most Francophone, do not have bank accounts, and the procurement of textbooks is made through centralized systems. Under such circumstances, countries will need to seriously study the pros and cons of using capitation grants, including of what the coverage should be. In cases where the coverage is very limited and/or the financial constraints or other reasons result in very small grants, the burden of transaction costs, especially at the school level, needs to be weighted against the advantages achieved through grant schemes (see comments for Ghana and Madagascar in section 3 above);

- The suggestion in the Ghana study to use two types of criteria for determining the amount allocated to each school, one proportional to the number of pupils enrolled, and the second being a fixed grant for each school, independent of size, to address the fact that many fixed costs are largely independent of school size;
 - The size of the grant needs to be adjusted over time to account for inflation (stressed in the Ghana and Kenya studies).
- (iii) Maintaining local supports: The case studies underlined the need to ensure that replacing fees with school grants does not lead to disengagement on part of parents and communities with respect to their school, including in providing support for when they can afford it. The case studies emphasize that the main objective of fee abolition is to ensure that no child is prevented to attend school because they cannot pay, and they give examples of how parental and community involvement in managing the school grants can be an effective means of increasing parental and community involvement in the life of their school.

5. Concluding remarks.

26. In summary, school fee abolition is increasingly used as a means of reducing cost barriers on families to enroll and maintain their children at school, and school grants are generally used as the a main instrument to replace – and often increase -- the income collected at school level through fees. The grants aim to improve education quality by providing financing for various types of essential school inputs beyond teacher salaries, and to enhance the involvement of parents and communities in school management. National and international staff involved in preparing education development plans for FTI endorsement need to be fully aware of both the major impact school fee abolition generally has on human, physical and financial requirements and, thus, on the financial sustainability and realism of such plans, and of what it will take to develop successful grant schemes to replace school fee income at the school level.

Annex : Summary information on fee abolition in five country studies

	Ethiopia	Ghana	Kenya	Malawi	Mozambique
Background					
Approach and year of fee abolition	“Big Bang” decision in 1994. But instruction to schools transmitted one year after decision	2005, scaling up pilot started in 2003, focused on deprived districts. 1996 plan for free UPE by 2006 not met.	“Big Bang” in January 2003 following election December 2002	“Big Bang” in 1994 following pledge during first multi-party election, although partial fee removal was introduced in 1991 and 1992	Decision made in 2003, effective in 2004 after testing. Phased implement. of direct support to schools 2004-2006
Fee abolition part of wider policy reform?	Yes, part of wide-ranging program: decentralization; curriculum reform; language of instruction; alternative basic education 0020	Yes, fee replacement to be spent on approved school improvement plan. Also part of wider education strategy and Ghana Growth and Poverty Reduction Strategy	Yes, electoral promise to abolish fees accompanied with plan to undertake comp. review of education system. Also, banning of “forced” repetition, encouragement for parents to send children to school, free training material	Yes, Gov. to raise ed. budget to provide what had been financed through fees, promote girls’ education, mother tongue instruction in Grades 1-4; more support for teachers	Yes, wide-ranging reform, e.g. direct support to schools beyond former fees, merger of two primary cycles, prov. of training materials, new curriculum, decentralization
Driving force/ political leadership	Part of Gov. new education policy	Success of pilot and civil society agitation about 2006 goal of free UPE not met led to scale up after only one year of pilot	Key election promise. Strong Gov. leadership including from President	Key election promise. Strong leadership by president and gov.	Election promise. Leadership by Min of Ed, consultation with Finance and donors
Prior planning	Minimal	Pilot planned as part of WB-supported project. Training programs conducted to build staff capacity. Decentralized structure strengthened to manage funds	None, given school year started just after election. But could use prior tested mechanism for money transfer to schools. Intense prep. launched just after election. Held stakeholder forum; task force created. Ministry staff visited districts to assess needs	Four months between decision and start implem. permitted some prior planning, but little analysis conducted prior to the reform and little learning from previous partial fee removal. Full-fledged investment plan only developed in 2001	Good. Phased, monitored implementation. Training of province, district, and school managers. Bank accounts opened with district directors.
Communication of new policy	Little communi. after directive issued. Gradual introduction over couple of years	Campaign on fee abolition conducted in all public schools	No time for prior consultations. But extensive awareness campaign during implementation	Nat. Policy Symposium for stakeholder consultation, mass media campaign, pre-registration of pupils	No negotiation with civil society but wide range of communication
Nature of fees abolished					
Which grades	Grades 1-10	Grades 1-9	Grades 1-8	Grades 1-8	First Grade 1-5, then 1-7
Which types of fees?	All types	All types	All types	All types. Uniform not compulsory	All types
Main use of fee income	For non-salary cost at school level	Training materials, non-salary operating costs	Most non-salary expenditures and even some salary expenditures	80% for text- and exercise books.	Varied by school: supplies, training materiel., sport equip.
Equal level of fees across schools?	No. Variation in amount, type of fees and collection procedures	No. variations among schools	No. Fee structures differed according to “needs” of individual schools	No. fees lower in rural than in urban areas, and lower for grades 1-5 than for grades 6-8.	In principle equal since Government stipulated fees per grade
Fees as share of recurrent expend.	4-6% of recurrent costs in public schools (1994)	Not available.	Not available. But fees high, ranging from US\$ 6.6 to US\$132 per parent per year	11% (1987). Up to now, Gov. has not fully replaced the fee income	Not available. But fees were quite high
Voluntary contribution permitted after fee abolition?	Yes, community support encouraged and is substantial	Yes, PTAs may raise money for school projects provided no child excluded because parents cannot pay	Yes, parents reminded about obligation to provide construction funds and provide uniforms, but no child should be denied access if parents cannot	Gov. undertook to finance teachers, learning material, and all infrastruc. Gov. has been slow in dev. and implementing strategy for community involvement.	Communities can raise funds, but cannot exclude children who cannot pay
Coverage of fee abolition					

Sequencing/ phasing by age, grade, over time?	No, but in practice gradually introduced over a couple of years	Priority in test year given to 40 most deprived districts.	No. Entry allowed in any grade at any age	No. Entry allowed in any grade at any age, resulting in that the highest increase was in Grade 8 enrollment (76%)	Five phases 2003- 06 gradually extending to Grades 1-7, and increasing grant size and items covered to health, OVC, girls
Mechanism for transferring to schools revenues to replace	Block grants from districts to each school about equal to annual fees	Capitation grant transferred to school bank account; equivalent to US\$2.70 per boy and US\$3.88 per girl per year Amounts based on actual fee level	Capitation grant of US\$14 equiv. per pupil per year; 2/3 for training materials/ supplies, 1/3 for operating exp. Money transferred to school bank accounts through system already pilot-tested. Plus school feeding in selected areas	Gov. to provide all learning material, teachers, classrooms, furniture, teachers' houses, sanitation facilities and boreholes; also finance "unassisted schools"	Grant to schools to finance supplies/ training materials on Gov. approved list, support for OVC
Includes private schools?	No.	No. Important given high share of private enrollment (18%)	Yes, provided fees not charged	Yes, provided fees not charged	No. Private sector small (3-4% of total enrollment)
Impact					
Increase in primary school enrollment	23% increase in total enrolment from 1994/95 to 1995/96. 29% growth in Grade 1	14% increase in total enrolment from 2004/05 to 2005/06	18% increase in total enrolment from 2002/3 to 2003/04	51% increase in total primary enroll. from 1993/94 to 994/95. 59% in Grade 1; 76% in Grade 8	12% increase in total primary enrollment from 2003/04 to 2004/05.
Gross enroll. ratio in primary ed.	1994/95: 26.2% 1995/96: 30.1% 2004/05: 79.8%	2004/05: 83.3% 2005/06: 92.7%	2002/03: 88% 2003/04: 103%	1993/94: 89% 1994/95: 134%	2003/04: 89.5% (Grades 1-7) 2004/05: 97.3% 2006/07: 113%
Gender Parity Index (girls/boys)	1994/95: 0.61 1995/96: 0.58 2004/05: 0.79	2004/05: 0.93 2005/06: 0.95	2002: 0.97 2003: 0.95 2004: 0.94	1993/94: 0.93 1994/95: 0.89 2005: 0.99	2003/04: 0.92 2004/05: 0.94
Pupil/teacher ratio	1994/95: 33 1995/96: 37 2004/05: 66	2004: 32	2002/03: 34 2003/04: 39	1993/94: 68 1994/95: 63	2003/04: 66 (Grades 1-5) 2005/06: 74 (Grades 1-5)
Coping strategies to address enrollment surge and protect quality	Increased class size and pupil- teacher ratio;	Combination of measures: shifts in schools where needed; use of retired, volunteer and pupil teachers; temporary class- rooms; extra training materials	Rapid resource mobilization to finance school grants for training material and operating costs. Teacher redeployment to address shortages. Special measures for disadvantaged areas.	Class-size from 50 to 60; hired 20,000 sec. school leavers; use of temporary shelters; use of temporary classrooms; multiple shifts;	Combination many measures, e.g., multi- shift, larger class size, restructure teacher tr. to increase output, lower construction costs to increase supply of classrooms
Measures to address quality concerns	School grants to replace fee revenues to finance training material	Training of un- trained teachers; more textbooks; mini-mum national standard test agreed	Main benefit: More training materials and supplies	Massive enrolment growth out-stripped extra resources and reinforced already low quality (per pupil exp. declined by 26% from 1993 to 1994)	Direct support to schools for training material and supplies
Early indications of impact on quality		Marked improved scores on math and English tests between 2003/04 and 2004/05	Reduction in repetition and dropout, and increase completion rates. Increased monitoring of quality	Inability to provide adequately to large enrollment surge led to serious decline in quality of learning environment	Direct support to school to replace fees a success story. Early evidence of improved quality
Benefits of fee abolition other than reduced costs and enrollment surge	Decentralized decision making; greater community ownership of schools	Added national momentum in favor of education	Stronger partnerships with stakeholders, strengthened decentralized management	Greater equity in enrollment by income group. But inability to provide for large surge limited other benefits	Local empowered, revitalization of school councils; promoted local-level accountability; direct support for OVC,
Donor support	Initial financed by Gov. Later part of multi-donor sector program	Pilot and scaling up supported through WB project	DfID, UNICEF, WB, SIDA, WFP, OPEC, Oxfam, Action Aid	Initially, only UNICEF. Then WB and DfID	WB, Dutch, UNICEF

Source: Five country studies. Taken from UNICEF/World Bank (2007).

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