



Effectiveness of Kenya's Education Bursary Scheme

1.0 Introduction

The provision of education and training to all Kenyans is fundamental to the success of the Kenya Government's overall development strategy of transforming Kenya into a newly-industrialising, middle income country providing high quality life to all its citizens in a clean and secure environment. Being a signatory to international conventions on education and the eradication of poverty, the Government of Kenya officially committed to the realisation of universal access to basic education and training, more so, to the disadvantaged and vulnerable groups in society. It is for this reason that the Government introduced programmes geared towards enhancing access to quality education. These include, among other measures, the Secondary Education Bursary Fund (SEBF); Free Primary Education (FPE); and lately, a tuition waiver in all public day secondary schools. The SEBF was introduced in Financial Year (FY) 1993/1994 with an initial allocation of Ksh. 25 million, which was increased to Ksh. 536 million in FY 2000/01, Ksh. 548 million in FY 2002/03, Ksh. 770 million in FY 2003/04 and FY 2004/05 and further to Ksh. 800 million for FY 2005/06, FY 2006/07 and FY 2007/08.

Allocations for the bursary fund are sent to all 210 constituencies in Kenya and vary depending on the Ministry of Education's annual provisions, the number of students enrolled in secondary schools in a particular constituency, total national secondary school enrolments, and poverty indices. The SEBF is aimed at enhancing access, equity and retention at secondary level. For these reasons, the bursary targets the vulnerable groups who include orphans, girls and children from poor families in slum areas, pockets of poverty in high potential areas, and Arid and Semi-Arid Lands (ASAL) districts. Therefore the SEBF is a decentralised fund, which is administered at the constituency level by a Constituency Bursary Fund Committee (CBFC) under the guidelines of the Ministry of Education,

which specify the application procedures, evaluation criteria and allocation ceilings. The Ministry of Education has provided further guidelines as to the minimum amounts to be awarded to applicants from the various categories of secondary schools. The recommended amounts are: Day Secondary Schools – Ksh. 5,000; Boarding Secondary Schools – Ksh. 10,000; and National Schools – Ksh. 15,000. The CBFC is charged with the responsibility of issuing and receiving bursary application forms as well as vetting and considering bursary applicants using established criteria. In spite of the many years that the bursary fund has been in place, its effectiveness has not been assessed. The Institute of Policy Analysis and Research (IPAR) undertook a survey in Nairobi Province between March and April 2008 to assess the effectiveness of the SEBF.

1.1 Objectives of the Survey

The broad objective of the survey was to assess the effectiveness of the SEBF. Specifically, the survey assessed the level of demand for the secondary education bursary fund; the efficiency of the secondary education bursary fund; and the level of leakages in the disbursement of the secondary education bursary fund in Nairobi Province.

1.2 Methodology

Nairobi Province is divided into eight constituencies, namely: Makadara, Embakasi, Kamukunji, Starehe, Westlands, Lang'ata, Dagoretti and Kasarani, with a total of 95 schools, of which, 48 are public schools. The survey as a case study covered all the eight constituencies and all the 48 public secondary schools in Nairobi Province. In addition, the survey covered one other national school, which, though located in Central Province, administratively it falls in Nairobi Province. Effectively, the survey covered 49 schools. The Survey used questionnaires to collect information from school principals in the 49 schools and from the Constituency Bursary Fund Committees (CBFCs) in the eight constituencies in Nairobi Province. Focus

group discussions were also held with student beneficiaries in 32 schools.

2.0 Findings

The findings of the survey as discussed below capture the demand levels of the bursary fund, efficiency in the administration of the fund, and leakages in the fund disbursement to beneficiaries.

2.1 Demand for Secondary Education Bursary Fund

The analysis over the four-year period reveals that an estimated 43 per cent of the applicants benefited from the bursary fund. Also, with the exception of one constituency (Lang'ata), applicants in other constituencies are not guaranteed of continuous funding and the level of funding relative to fees requirements is very low, leaving the students with huge fee balances to clear. From the analysis of the bursary levels allocated to beneficiaries, a majority of the students (84.2 per cent) received the minimum allocation of Ksh. 5,000 and a paltry 0.4 per cent received the maximum of Ksh. 15,000. Though the government approved maximum fees chargeable by day schools is Ksh. 10,500; other boarding schools is Ksh. 22,900 and national schools is Ksh. 28,900, schools do not adhere to this limit and majority charge up to more than double these amounts with the approval of the Parents Teacher Association. The amounts of bursary fund allocated to beneficiaries are therefore too low to cover the tuition fees for those assessed as poor and needy and currently, 57 per cent of the demand for bursary is unmet.

Over the four-year period Nairobi Province received a total of Ksh. 118,860,386 from the Ministry of Education for bursary awards. However, only an equivalent of 29.42 per cent was allocated to students in public schools in Nairobi Province. Further analysis revealed that out of the total amount received by schools as bursaries over the period 2004 – 2007, an estimated 62 per cent was from other funds and foundations such as: The Jomo Kenyatta Foundation; World Vision; Local Authority Transfer Fund; Faith Based Organisations; Constituency Development Fund; Chandaria Foundation; among others. Of these providers, the beneficiaries of the Jomo Kenyatta Foundation are the majority and those benefiting from the Foundation are guaranteed full bursary for their secondary schooling once evaluated as poor and needy.

2.2 Efficiency in Administration of the SEBF

The efficiency of the bursary fund is affected by the timeliness of fund disbursements; communication between different institutions overseeing the operationalisation of the fund; accountability mechanisms; consistency of support; and application procedures; among others.

Timeliness: The budgetary provision for the bursary fund is done for a financial year and this is different from the academic (calendar) year. Apart from there being no clear schedule for disbursing funds at the CBFC level to beneficiaries, data collected from the survey do not depict any clear format followed in disbursement of funds from the Ministry of Education to CBFCs. The disbursement schedule is clearly not synchronised with the school programme; often bursaries are awarded late during the school sessions, forcing students to make numerous trips to the education offices to inquire on the status of their funding. This disrupts their learning programme and by the time they are aware of their bursary allocations, they have missed several days of learning, which contributes to poor performance among students from poor families.

Communication: According to the CBFC secretaries, information is disseminated on public notice boards especially at the educational and chiefs' offices, at the places of worship, in *barazas*, especially those held by the provincial administration and in schools and during school functions by school heads. Beneficiaries noted that information availed is scanty leaving them confused especially regarding where to return the completed forms. This is because the beneficiaries' areas of residence, places of worship and location of schools are not necessarily in the same constituency in Nairobi Province. Students who wish to apply for bursary awards could get forms either from their schools, educational office or from the provincial administration offices. Notwithstanding the various sources where one can access the forms, the completed forms are supposed to be returned to the education office in their constituency. This confusion has seen many needy cases disqualified during the screening process for fear of double allocation.

Application Procedures: Beneficiaries unanimously noted with concern that the application process is cumbersome. The beneficiaries were particularly unhappy with the requirements that a section of the application form has to be completed by their primary

schools heads, the local chief or the pastor, who are not easy to access. Besides, in Nairobi, unlike in the rural areas, it is hard for the chief or the pastor to be conversant with the welfare status of the applicants given the populations involved. Therefore, information provided by the chief and pastor is based on what the applicant tells them and not what they know about the applicant

Returns to Ministries from Constituencies: The guidelines require CBFCs to prepare and submit reports on the Constituency Bursary Fund to the Permanent Secretary, Ministry of Education. However the guidelines do not specify the nature of details contained in the returns. Therefore, returns vary in content and format from one constituency to another. The variation on information provided in returns coupled with high turnover of CBFC secretaries makes it difficult to obtain some information on applicants and beneficiaries within and across constituencies.

Consistency of Support: Survey data reveal that funds allocated to the 8 constituencies fluctuated, sometimes quite significantly and this makes planning by CBFCs difficult. Because of the fluctuations, students are not guaranteed continuous funding to completion of high school education. Instead, students are required to apply for consideration annually. This means that even in one academic year, a student is not guaranteed funding as the release of funds is usually done three or two times annually.

2.3 Leakages of the SEBF

There is poor record keeping at the constituency level. In two constituencies, the area members of parliament are said to have taken control of the fund, deciding on who gets the bursaries and at the same time, keeps the records of applicants and beneficiaries. Arising from these, there exists substantial variations in data on number of beneficiaries in the Ministry of Education records and data collected by the survey. One source of these variations is poor record keeping. Whereas for some years returns indicate disbursement in two phases, some constituencies indicate receipt of funds in three phases, others even four phases. Overall, 7 per cent of the money allocated to Nairobi Province did not reach the intended beneficiaries.

3.0. Conclusions and Recommendations

3.1. Conclusions

The current bursary fund has limitations both on governance, effectiveness and consistency. As a

result of low budgetary provision, the fund has not achieved its main objective of ensuring access and retention: an estimated 57 per cent of the demand is not met; the allocation of funds from the Ministry of Education to constituencies and from constituencies to beneficiaries is not in tandem with the school programme; the application procedures are cumbersome and therefore time wasting; Information regarding bursary funding is not well kept; there is no standardised format of reporting from CBFCs to the Ministry of Education; and the amounts allocated to CBFCs and the returns on disbursements to beneficiaries reveal that huge amounts remain unallocated yet there is unmet demand. On average, over the four-year period, an estimated 7 per cent of the money allocated to Nairobi Province did not reach the intended beneficiaries.

3.2. Policy recommendations

Based on the findings of the survey, the following recommendations are made:

- The Ministry should issue comprehensive guidelines to the constituencies with regard to the type of information that should be submitted by the CBFCs to the Ministry. A standard returns template should be issued to the CBFCs requiring all constituencies to follow a specific format.
- The bursary awarding evaluation criteria should be revised to emphasise School Principals' assessment of continuing students' need for financial assistance as adequate.
- The Government should create a national data bank for all learners in public schools and training institutions in Kenya for use in assessing applicants of bursary and other such funds and also for ensuring consistent funding for all those who qualify for bursary.
- The Government should establish a framework of monitoring and enhancing collaboration networks with other bursary providers in order to achieve synergies and avoid duplication of efforts.
- To enhance effectiveness of the secondary education bursary fund, the government should finance adequately fewer needy students than to thinly fund many students without any assurance of continuity.
- There should be a mechanism of monitoring the flow of funds from the Treasury through the Ministry of Education to constituencies and finally to schools to ensure timely

disbursement of bursary funds to beneficiaries within the phase in which they are received. Being a budgetary provision, bursary funds should be disbursed in one phase preferably in November of each year for allocation in December to beneficiaries before the start of each academic year in January. One-off allocations are preferred to avoid unnecessary anticipation from students and this will also minimise costs of fund administration.

Suggested Framework for Bursary Returns

SECONDARY EDUCATION BURSARY FUND RETURNS FORM						
PROVINCE						
CONSTITUENCY NAME						
DATA FUNDS WERE RECEIVED						
BURSARY FUNDS C/F						
CURRENT PHASE ALLOCATION FROM THE MINISTRY						
TOTAL FUNDS FOR ALLOCATION TO BENEFICIARIES						
DATA FUNDS WERE ALLOCATED						
	BOYS	GIRLS	COMPLETE ORPHANS	SINGLE PARENT	BOTH PARENTS	TOTALS
NUMBER OF APPLICANTS						
NUMBER OF BENEFICIARIES						
BENEFITING SCHOOLS						
PUBLIC (NAIROBI)						
PUBLIC (OTHERS)						
PRIVATE (NAIROBI)						
PRIVATE(OTHERS)						
TOTAL BURSARY ALLOCATED						
UNALLOCATED FUNDS						

For detailed discussion of the issues contained in this Brief, refer to IPAR Discussion Paper No. 107/2008: **Public Expenditure Tracking of Secondary Education Bursary Fund in Nairobi Province** by Lineth N. Oyugi, Andrew R. Riechi and Evelyn Anupi. ISBN 9966-948-38-4.

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