



Universal, but not free: Household schooling costs and equity effects of Uganda's Universal Secondary Education policy



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ABSTRACT

A general consensus regarding universal schooling policies is that they have boosted enrollments while ignoring the quality of learning, although there is burgeoning research interest in the extent to which such policies have contributed to more equitable educational delivery. This paper analyzes household and school level effects of Uganda's Universal Secondary Education (USE) policy, launched in 2007. We rely on data drawn from the Uganda National Panel Survey (UNPS) rounds in 2005 and 2009–11, which are included as part of the World Bank's Living Standards Measurement Study (LSMS). We find that receipt of the USE capitation grant has increased substantially for most pupils, and is associated with a 60% reduction in household spending on education per child, at the lower secondary level. At the same time this relationship does not differ by wealth or by region. Further, we do not find evidence to suggest the policy boosted school attendance or retention, at the lower secondary level. Overall, our findings suggest a need for greater attention to the equity effects of universal education policies.

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1. Introduction¹

“To me universal education means education for all children, but it doesn't mean free education. Those are two different things and people are mixing them up. Politicians think USE means ‘free’ education, it does not! If it's free then why is government only paying 47,000? Give all the facilities, the classrooms, the desks, the books, and then pay the teachers, that is free.” – District Education Official, northern Uganda

The effort to provide schooling opportunities for all children and youth in the Education for All (EFA) era has come with costs that have been borne jointly by government and private citizens. While debates about the extent to which each side should be responsible for those costs are inherently tied to notions of social justice, as well as economic views of education as a public versus a private good, scant empirical attention has been given to the economic reality of households facing a decision about whether to send children to school or not. As demonstrated by the above quote

from a local government official in northern Uganda, at the secondary level, those costs are considerable. This paper sheds light on the extent to which households invest in lower secondary schooling opportunities in the aftermath of the Universal Secondary Education (USE) policy adopted by the Government of Uganda (GoU). Universal education policies have received increased attention with the renewed focus on equitable service delivery within the global development framework adopted through the UN's Sustainable Development Goals (SDGs), particularly SDG 4.5 which among its targets calls for “equal access to all levels of education and vocational training for the vulnerable”.

Specifically, this paper examines linkages between the introduction of the Universal Post-Primary Education & Training (UPPET) policy, hereafter referred to as the USE policy, and changes in educational service delivery, with a particular focus on household expenses and school retention. We draw on data from the Uganda National Panel Survey (UNPS), which was carried out before the launch of the policy in 2005 and concurrently with its rollout in 2009–2012, and find mixed evidence that the USE capitation grant is associated with lower household school expenditures. We do not find conclusive evidence that the policy has improved attendance or retention. Finally, we find mixed evidence for the equity-promoting effects of the policy. The policy does largely benefit the lowest income groups: 49% of lower secondary pupils in the poorest two wealth quintiles (Q1 and Q2) receive the subsidy compared to 20% in the richest quintile (Q5). At

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¹ ESSP – Education Sector Strategic Plan; EFA – Education for All; GoU – Government of Uganda; PLE – Primary Leaving Examination; PPP – Public-private partnership; SFAI – School Fee Abolition Initiative; UNPS – Uganda National Panel Survey; UPE – Universal Primary Education; UPPET – Universal Post-Primary Education & Training; USE – Universal Secondary Education.

Table 1
Relevant Goals of UPPET.²

- Expanding access and improving attendance in secondary education and BTVET
- Reducing high cost of secondary education and BTVET
- Increasing equitable access to secondary education and BTVET for special groups
- Adding value to the sustainability of UPE

the same time, lower income and rural households continue to represent those who spend the greatest proportion of their budgets on lower secondary schooling.

When introduced in 2007, USE was the first universal education policy at the secondary level in sub-Saharan Africa. According to MoES, the government's hopes with USE included capitalizing on the massive increase in schooling access brought about with Universal Primary Education (UPE), and extending the benefits of educational access to older age cohorts (MoES, 2013). UPE is widely credited with a massive increase in primary school access in Uganda, with enrollments increasing from 3.1 million in 1997 (the year the policy was launched) to 7.6 million in 2003 (ODI, 2006). At the same time, there are indications that the success seen at the primary level in Uganda may be difficult to replicate at the secondary level. As the government states in the most recent *Education Sector Strategic Plan (ESSP)*, "the policy of USE by 2015 poses challenges of both access and quality, and has to [be] achieved within the resources available . . . as currently structured, the post-primary system cannot accommodate all the P7 completers who wish to continue their education" (2010, p. 41).

The paper is structured as follows; we first present an overview of the policy, its stated goals and how it is administered. We then briefly review existing literature on the effects of universal schooling policies and research on household educational expenditure, with a particular focus on USE. We follow with a review of data sources and methodology for the present study, and introduce our three research questions. Finally we present our findings using a descriptive analysis of attendance and household expenditure patterns over the roll-out of the policy, and provide evidence for the policy's effects on household expenditures and retention. A discussion of our findings follows, with a particular focus on equity implications for the post-2015 education agenda.

2. Overview of Universal Secondary Education policy

The USE policy was launched with the broad goals of improving access to and quality of lower secondary schooling. Its status as the first universal education policy launched at the secondary level in Sub-Saharan Africa has afforded it a heightened degree of attention from researchers and policymakers. As the government acknowledges, it includes efforts to "expand access and improve attendance in secondary education", "reduce high cost of secondary education" and "increase equitable access to secondary education." (Table 1). As asserted in the 2013 USE Headcount publication (MoES, 2013), which represents the Ministry's evaluation of the program, the USE policy has transformed education and skills development in all three areas and has further addressed quality issues by providing students with the knowledge and skills needed to compete in a global economy. A central component of the Government of Uganda (GoU) strategy to address these objectives is through a capitation grant provided to both government and private schools that offer education at the secondary level. This per-pupil capitation grant is intended to offset the costs of tuition

and related fees, which have traditionally been passed on to students' families or absorbed at the school level.

Eligibility for the program is determined by a satisfactory score on the Primary Leaving Examination (PLE) at the end of Primary 7, as well as successful and on-time completion of each grade of O-Level (lower secondary). The policy was introduced by targeting a specific cohort, with the first phase in 2007 targeting Senior 1 (S1) pupils in that year, and then pupils in higher grades in each successive year (MoES 2013, p 13). In 2011 the government launched a similar program for the upper secondary (post O-Level) level, and both policies target pupils enrolled at TVET schools as well. These objectives are to be accomplished through a host of initiatives, with a per-pupil grant provided to schools that opt in to the program. The amount of the capitation grant depends on the type of school that the student attends; 41,000 Ugandan Shilling (US\$) for government schools and 47,000 for private schools,³ per term. According to Barungi et al. (2015), the decision to provide an opportunity for attendance at private schools is in part to provide low-income pupils the opportunity for a higher quality education (p. 4). Schools are required to open a bank account where funds are transferred as a lump sum every year, dependent on the number of enrolled eligible students. This allows administrators to pay for salaries and infrastructure, as well as other activities at the school level. Guidelines require that the funds be spent on covering tuition per eligible pupil, teacher salaries and other inputs (Barungi et al., 2015).

MoES has also shown interest in the effectiveness of the roll-out of the USE, as demonstrated with the Headcount exercise.⁴ The Headcount was administered in 2013 as a secondary school census and data collection designed to document present conditions, as well as time trends in enrollment, survival, gender parity and learning outcomes in USE schools. As evidence for the policy's impact on secondary access, MoES found an increase in enrollment in S1 in USE schools from 160,000 to 250,000 between 2007 and 2013 (MoES 2013, p. 15). Additionally, it found a USE survival rate of 72% for the cohort that began S1 in 2010, with the remaining students having repeated a grade, transferred to a non-USE school, or dropped out. Other reasons cited for dropout included refugees returned to Sudan, early pregnancies, and schools that opted out of the program. The government also acknowledges that the program is affected by a loss of students due to poor infrastructure conditions, which causes parents to "opt for non-USE schools", and a dearth of teachers in USE schools that are unable to hire an adequate number to facilitate instruction, particularly in rural areas.

An independent evaluation of the program reported that $\frac{3}{4}$ of head teachers claimed the capitation grant is inadequate and has not been adjusted for inflation. There have also been reports of the late release of funds causing schools to seek assistance from "either friends or banks (at high interest rate) to clear the bills" (Barungi

³ Roughly equivalent to \$13–16 USD in 2015.

⁴ The 2013 Headcount represents the MoES evaluation of the USE program. It states as its objectives; to establish the number of students enrolled under the UPPET/UPOLET programs, to assess equity in access, to assess dropout, to assess quality of learning and efficiency, and to get feedback from schools and institutions (MoES, 2013, p. 2).

² MoES (2013; p. 1).

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