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THE  
HARVARD  
INSTITUTE FOR  
INTERNATIONAL  
DEVELOPMENT

**Understanding Access,  
Equity and Gender  
in Education**

**Trainer's Manual**



# **UNDERSTANDING ACCESS, EQUITY AND GENDER IN EDUCATION**

## **Trainer's Manual**

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The Basic Research and Implementation in Developing Education Systems Project (BRIDGES) is directed by the Harvard Institute for International Development and the Harvard Graduate School of Education with the Office of Education, Bureau for Science and Technology, United States Agency for International Development.

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# **GUIDELINES AND INSTRUCTIONS**

## **Preparation by the Trainer**

1. Read Mary B. Anderson's Report on "Improving Access to Schooling in the Third World: An Overview," and The Forum, Volume 1, Issue 1, June, 1991 on "Solving Access Problems."
2. Read the Trainer's Manual and look at the slides, overheads and handouts.
3. Instructions from the Trainer's Manual may be put on note cards to facilitate the presentation.

## **Materials Needed**

1. Overheads 1-19
2. Overhead projector
3. Marking pens for overheads
4. Participant Manuals and pens for participants
5. Watch or timer to monitor time
6. Board for writing

## **Size of the Group**

Twenty participants are suggested to allow for maximum interaction, although the module can be used with up to 40 people. Many of the activities within the module use teams of three or four people to encourage interaction among the participants. Larger teams can work together as well.

## **GUIDELINES AND INSTRUCTIONS (cont.)**

### **Suggested Times**

Part I: 45 minutes

Part II: 45 minutes

Part III: 60 minutes

### **Design of the Module**

This module is designed to accommodate a variety of teaching styles. While it is essential to follow the instructions in the Trainer's Manual in the order which they are presented, each trainer may add comments, ask questions or expand the discussion at any time. There are no perfect solutions to the problems of disparities and limited access; this module will help the participants understand these issues and guide future actions. Trainers may find it helpful to keep a pad nearby to note the reactions of the participants as they proceed through the module.

# **BACKGROUND**

## **Background**

This module is designed to be used as a workshop for policymakers, planners, school leaders and school faculties. It is one of a series of modules designed to help make available the results of the BRIDGES Project research in developing countries. The publication and research efforts used in this module have been done by the Education Group of the Harvard Institute for International Development.

BRIDGES stands for Basic Research and Implementation in Developing Educational Systems Project and is directed by the Harvard Institute for International Development and the Harvard Graduate School of Education. The BRIDGES group includes researchers, planners and policymakers who are committed to improving opportunity and quality in schools in developing nations. The goal of their collaborative effort is to identify policy options that will:

1. Increase children's access to schooling;
2. Reduce the frequency of leaving school early and repetition;
3. Improve the amount and quality of what is learned;
4. Optimize the use of fiscal and educational resources.

The BRIDGES project spent five years researching educational issues in fifteen different developing countries. From this research, BRIDGES has produced a series of research reports which summarize research findings about a particular policy and suggest specific policy options.

This module was based on the first report published in March of 1988, "Improving Access to Schooling in the Third World: An Overview," by Mary Anderson. The purpose of the module is not to give a prescription for increasing access and equity, but rather to encourage dialogue and collective thinking on issues related to access and equity.

The module is designed for use in one-day workshops, or in parts on successive days following the same order. Each part builds on learning from the previous parts of the module. A variety of teaching methods and group activities are used to transmit the contents of this module.

# **GOAL AND OBJECTIVES**

## **Goal**

The goal of this training module is to raise issues in education that will guide policymakers in planning for greater access and equity in educational systems.

## **Objectives**

1. To clearly define access and equity.
2. To examine issues of educational access using the experience of the participants.
3. To outline critical questions related to educational access, equity and gender issues.
4. To identify factors that BRIDGES research found lead to differential access and educational disparities.
5. To examine access issues as these relate to disparities among groups using the context of Kenya (a case study).
6. To discuss various policy options available to governments for addressing educational access and disparities.

Most importantly, this module is designed to offer participants a framework and a process for understanding issues of **ACCESS** and **EQUITY**.

## **Part I: INTRODUCTION**

### **A. Why are we talking about access in education?**

#### **Note to Trainer**

The trainer first introduces him/herself and then gives a brief introduction to the BRIDGES Project and the module, using the information given in the background section.

#### **Text for Trainer**

This module is one of a series of modules designed to help make available the results of the BRIDGES Project research in developing countries. The publication and research efforts used in this module have been done by the Education Group of the Harvard Institute for International Development.

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## A. Why are we talking about access in education? (cont.)

### **Text for Trainer**

Your Participant's Manuals provide space for note-taking as we work throughout this session.

### **Note to Trainer**

Read the following text and then move on to *Overheads 1* and *2*.

### **Text for Trainer**

Many governments in Africa, Asia and Latin America are committed to providing universal access to schooling for children in their country. Education is important, not only because it is a critical component of the development process, but because it is a basic human right and strongly related to social equality, justice and the full development of the human personality and the sense of one's dignity. These are two main reasons for trying to provide schooling for all children.

—> *Display Overhead 1 and read aloud.*

**MANY COUNTRIES HOLD A POLICY COMMITMENT TO  
PROVIDE UNIVERSAL ACCESS TO EDUCATION**

**"To all citizens...regardless of wealth, location, age, sex,  
religion or ethnic group."**

**(MALAKPA, 1986, UNESCO, FOURTH CONSULTATION, 1985)**

## **A. Why are we talking about access in education? (cont.)**

### **Text for Trainer**

Many of these same governments have inherited inadequate educational systems from colonial rulers and now face resource constraints for building up these systems. These governments, therefore, have not been able to achieve universal enrollment. It is assumed that if resource allocations were increased, more classrooms would be available and all children would be able to attend school. Access issues would then be solved. However, research and experience have shown that issues related to access are more complex and should not be isolated from issues of equity.

BRIDGES has found that policies initiated to increase access for all children can result in increased participation for some groups, but continued underenrollment for others. Failure to enroll certain groups can cause divisions within society and can result in pockets of less productive people. This in turn can skew the development process.

—> *Display Overhead 2 and read aloud.*

### **COMPONENTS OF THIS POLICY ARE:**

1. TO EXTEND ACCESS
2. TO EQUALIZE ACCESS
3. TO IMPROVE AND EQUALIZE THE QUALITY OF EDUCATION
4. TO IMPROVE AND EQUALIZE RETENTION RATES AND OPPORTUNITIES FOR PROMOTION OF ALL GROUPS
5. TO IMPROVE AND EQUALIZE THE CHANCES FOR SUCCESSFUL EMPLOYMENT

## **B. Group Activity: Assessing Expectations and Resources**

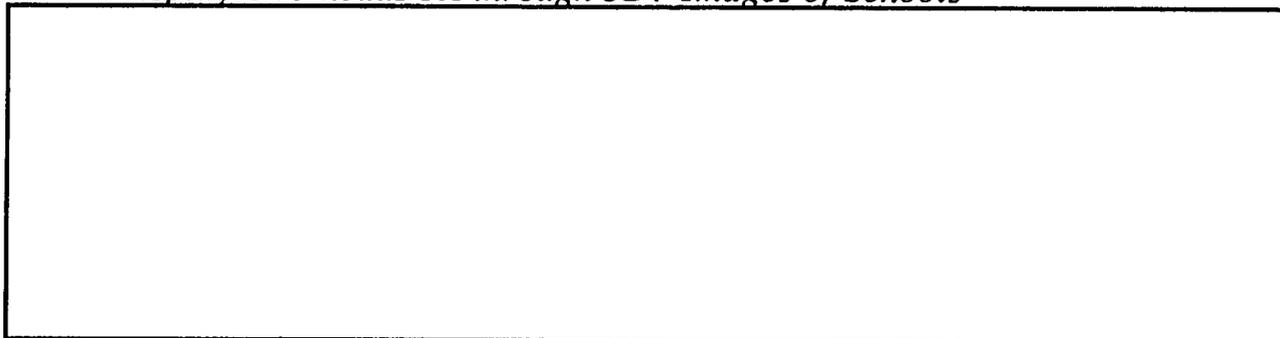
### **Note to Trainer**

Now is the time to get more comfortable with each other and have the group introduce themselves. To "break the ice," display images of schooling in different environments using overheads provided. After showing these images, ask participants to introduce themselves.

### **Text for Trainer**

As we look at the variety of school environments, we need to focus on the diversity of schools and settings that offer education. [Display *Overhead 3A.*] This module will help us recognize and consider some difference in children's opportunities to participate in school. [Display *Overhead 3B.*] These images give us a picture of schooling and its diversity. [Display *Overheads 3C and 3D.*]

—> *Display Overheads 3A through 3D: Images of Schools*



## **B. Group Activity: Assessing Expectations and Resources (cont.)**

### **Note to Trainer**

Hand out two index cards to each participant. Participants fill out two cards. You can keep *Overheads 3A* through *3D* on the projector for people who finish filling out the cards early.

### **Text for Trainer**

To begin we need to know a bit more about our own group. I am handing out two index cards and am going to ask you to write out your responses to the following questions

**Card 1:** What do you hope to gain from this workshop?

**Card 2:** What experience do you have in educational issues of access and equity?

### **Note to Trainer**

This exercise is an optional activity. If you choose to use it, it will be followed by a self-introduction period. If you choose not to use it, simply move on immediately to the self-introduction period.

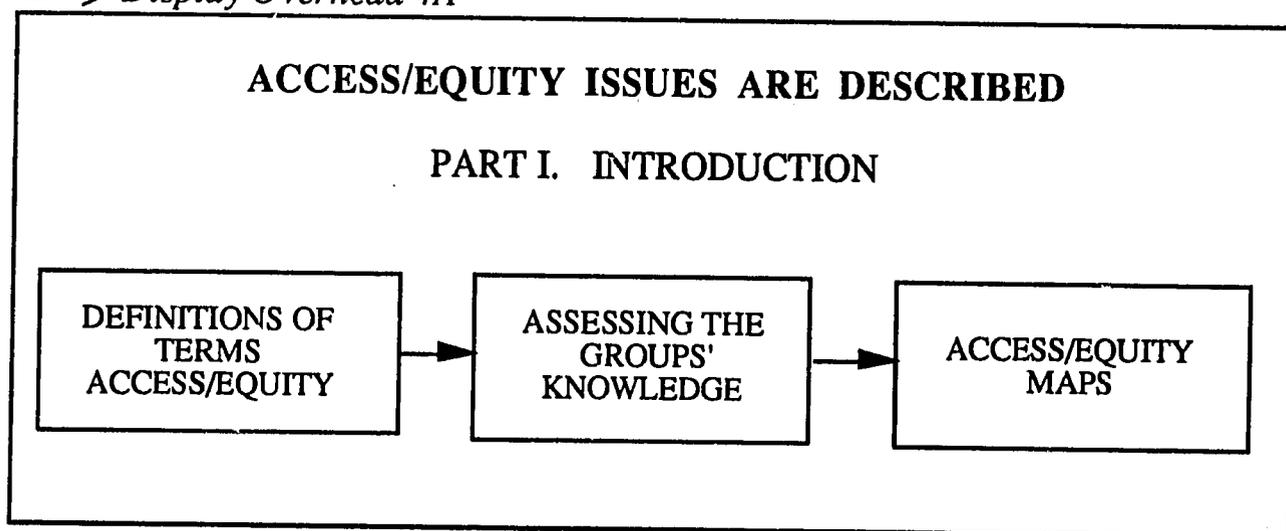
Try to encourage participants to mention either something they hope to gain or something they can contribute. These cards are also useful to help guide the final question and answer period. The trainer can also look these over and decide which participants may later form working groups.

## C. What are the issues?

### Text for Trainer

Part I of the module will define access and equity and introduce some of the critical issues related to access and equity.

—> *Display Overhead 4A*

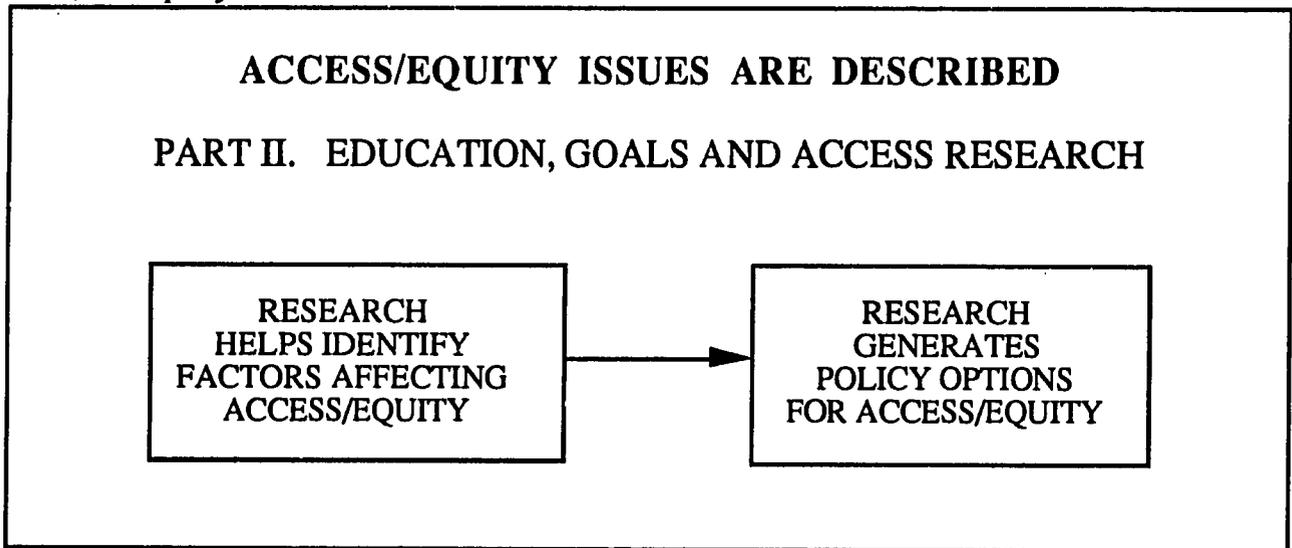


## C. What are the issues? (cont.)

### **Text for Trainer**

**Part II** will focus on the factors that affect school participation of different groups by outlining the BRIDGES research, as well as other relevant research.

—> *Display Overhead 4B*

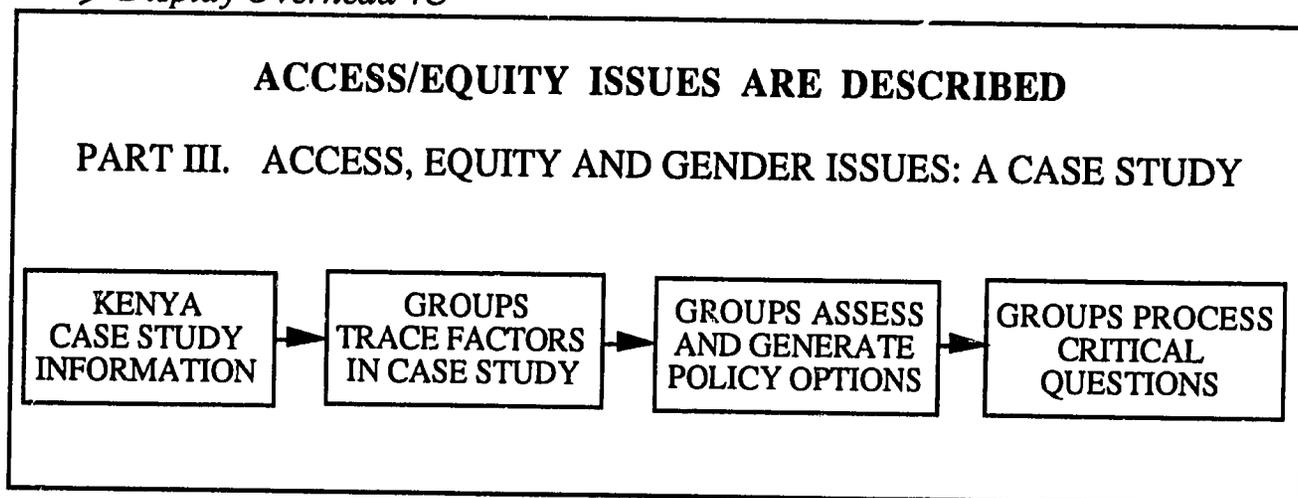


## C. What are the issues? (cont.)

### **Text for Trainer**

Part III will examine a case study from Kenya to help us understand the interplay of access and equity. It will involve all participants in thinking about how to offer schooling for all children and maintain equity in educating all social groups and generating questions and guidelines for policymakers.

—> *Display Overhead 4C*



## C. What are the issues? (cont.)

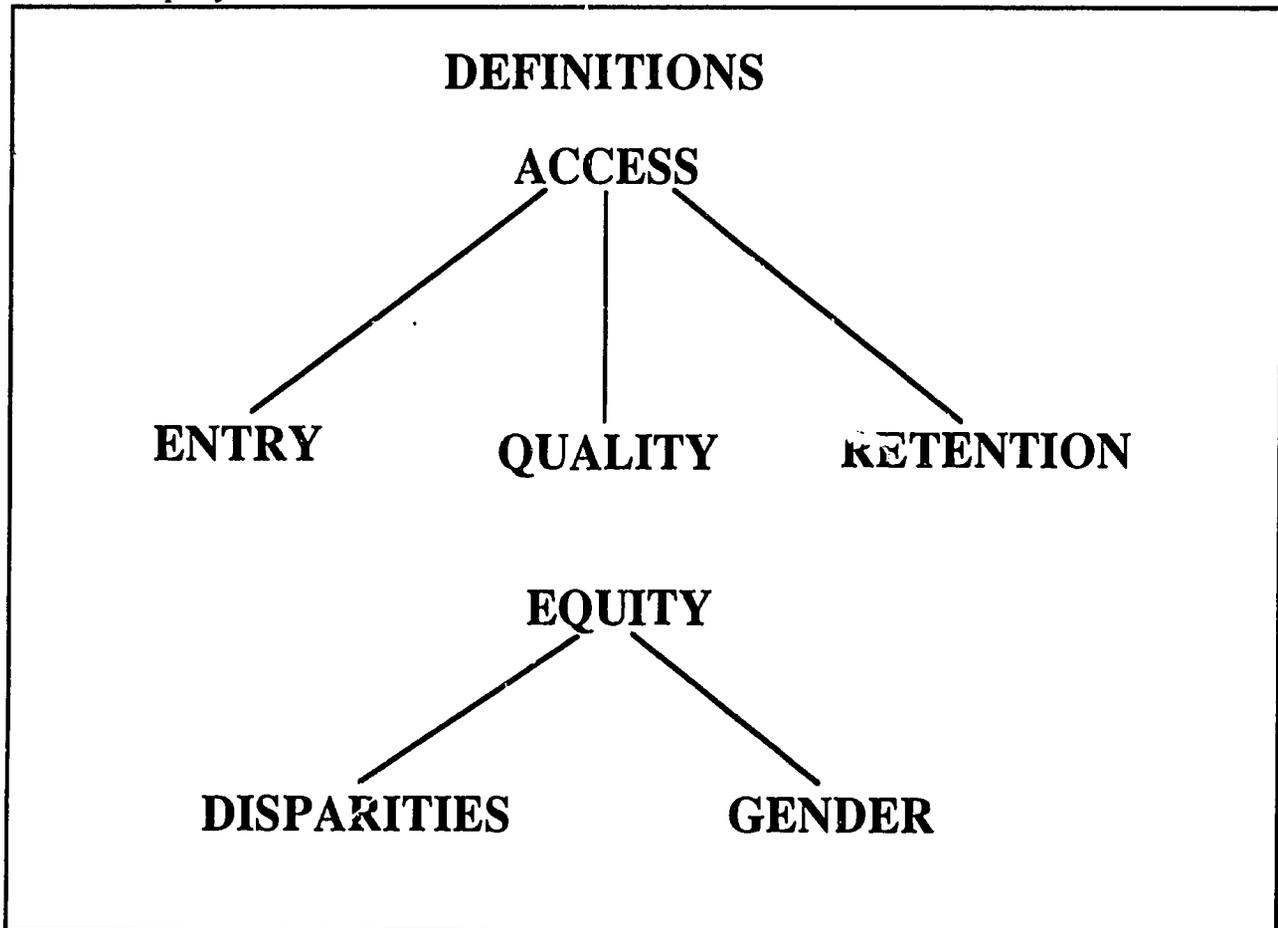
### Note to Trainer

Before moving on, inform the participants that we are about to cover an extensive amount of material, and they should be taking notes in the space provided in their Participants Manuals.

### Text for Trainer

We are now going to begin an intense discussion of the issues of Access and Equity. We have a lot of material to present in a fairly short amount of time. Please do not hesitate to let me know if we are moving too quickly, or if you have any questions or comments to make.

—> *Display Overhead 5*



## C. What are the issues? (cont.)

### Text for Trainer

This module reviews concepts related to access in education in Africa, Asia and Latin America. How do we define access? Let's expand our thinking on the terms listed in *Overhead 5*. This information can be found in your Participant's Manuals on Page 4.

Access to education includes:

1. Entry into school (opportunity);
2. Retention in school (participation);
3. Quality of education.

Access issues are closely related to equity. Equity is limited by the different opportunities available for educating:

1. Different populations in a single country (disparities)
2. Males and females (gender issues)

## **The Issues Related to Access and Equity: A Brief Group Brainstorming**

### **Note to Trainer**

The first part of the next exercise is very useful for encouraging participants to think about the role of education, even if you only spend a few minutes on it.

### **Text for Trainer**

To help us generate ideas, I would like to first read a statement and then ask you whether or not you agree with it and why. Take a moment to note your thoughts on Page 5 of your Participant's Manual.

1. Access to schooling is every person's right and should be provided by the state.
2. Access to schooling means more opportunities for schooling of groups who currently do not attend school.

## **The Issues Related to Access and Equity: A Brief Group Brainstorming (cont.)**

### **Note to Trainer**

Ask the following questions to generate ideas about some of the barriers and strategies to improve access and equity. As the participants come up with ideas, the trainer will write their responses on the BOARD.

### **Text for Trainer**

1. If we agree on these two ideas why is it that the access issue in education is not resolved?
2. If the access issue remains unresolved, what are some of the missing elements we still need to try to understand?

## **The Issues Related to Access and Equity: A Brief Group Brainstorming (cont.)**

### **Note to Trainer**

The following are some examples of access issues to be resolved. Participants will be asked to consult Charts A and B at the end of their Participant's Manual.

### **Text for Trainer**

The following are six examples of access issues to be resolved. For a better idea of the missing elements and areas to study, consult Charts A and B at the end of the Participant's Manual.

There is space on Page 6 of your Participant's Manual for the following elements to be written down.

The critical elements related to access and equity include:

- 1.) The availability of physical facilities;
- 2.) The availability of teachers;
- 3.) The absence of barriers (fees, uniforms, books, admission, requirements);
- 4.) Parental motivation;
- 5.) Opportunity costs;
- 6.) Cultural or religious prohibition.

## **The Issues Related to Access and Equity: A Brief Group Brainstorming (cont.)**

### **Note to Trainer**

At this point the definitions and conditions of equity and access should be clear. Check with participants to make sure that there are no difficulties at this point.

### **Text for Trainer**

The issues that we have raised here are very similar to the critical questions raised by BRIDGES research. It is important to understand that although much of the research has come up with similar results, conflicting evidence does exist. Therefore, it is difficult to make absolute conclusions for policy development.

A more helpful and simpler route is for policymakers to look analytically at what research can suggest. It is this kind of informed thinking that will aid tremendously in making policy decisions.

## D. An Effort at Access and Equity: Pakistan

### Text for Trainer

For example, let us take a brief look at what research has shown us about access and equity in Pakistan. These maps help us visualize some of the issues of access to education and disparities among groups.

—> *Display Overhead 6*

**NORTHWEST FRONTIER PROVINCE  
HUMAN RESOURCE SURVEY - SEMI RURAL AREAS  
[SEE MAP]**

### Text for Trainer

For example, *Overhead 6* shows the Northwest Frontier Province of Pakistan, where we see that opportunities for girls vary greatly by district.

## D. An Effort at Access and Equity: Pakistan (cont.)

—> *Display Overhead 7*

**BALUCHISTAN PRIMARY EDUCATION  
FEMALE/MALE ENROLMENT RATIOS  
[SEE MAP]**

### **Text for Trainer**

*Overhead 7* depicts the Balochistan Province, where we see that, despite a province average ratio of 24 females per 100 males, there is a great deal of variation. For example, in one district the ratio is 41-50 per 100, and in another a much lower ratio of 6-10 per 100.

Possible discussion questions:

- 1) What do these maps tell us about Access?
- 2) What do they hint at regarding Equity?

## Part II: Education Goals and Access Research

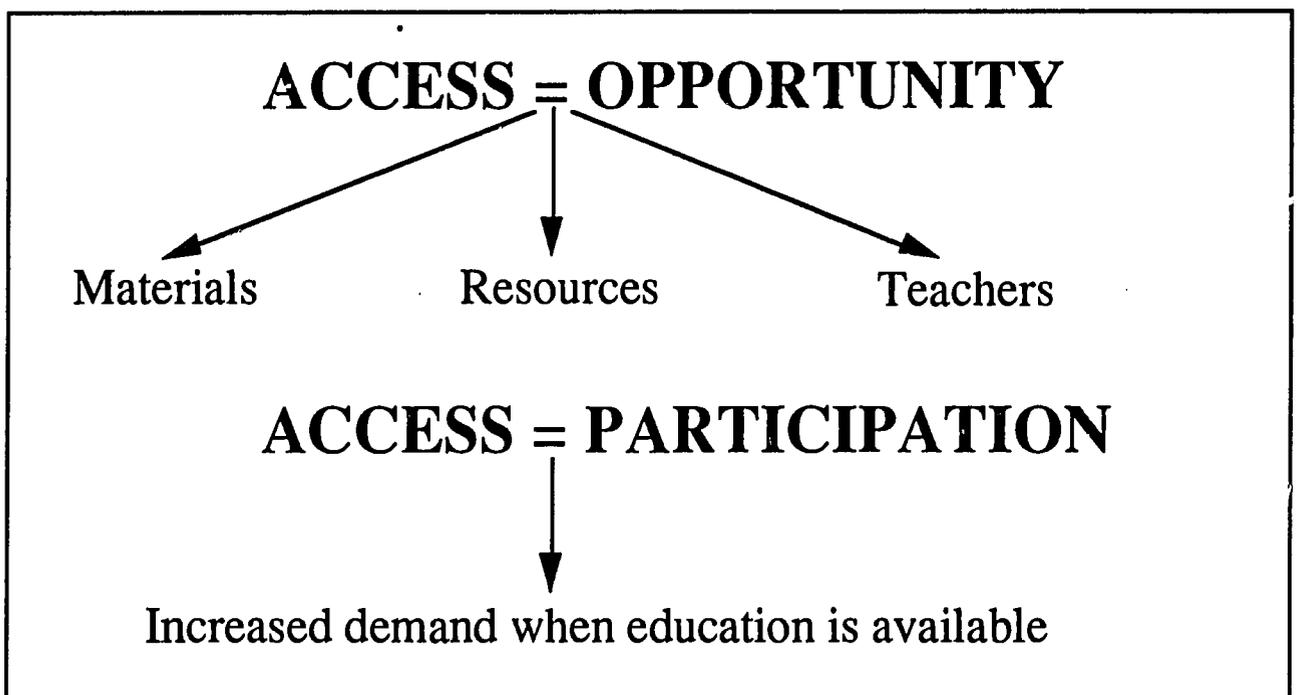
### Text for Trainer

During this segment of the module we will first examine some of the choices and issues confronting policymakers because of limited economic resources. Secondly, we will take a closer look at some of the studies that will assist policymakers who are concerned with policy impacts on educational systems. As we go over these issues please write down the major points in your Participant's Manual.

A principal goal of educational policy has been extending access to education.

### Note to Trainer

Write the following on the BOARD, or on a blank overhead:



## Education Goals and Access Research (cont.)

### Text for Trainer

Limited access often results from limited educational resources. Policymakers try to supply the greatest educational product for the lowest cost. Demand is partly reflected by the initial enrollment figures. When demand is high, there is the danger of policymakers attempting to supply more educational opportunities at the same cost, which may affect the quality of education for all individuals.

### A. Expansion of Access to Education

Policymakers are concerned with the expansion of education. The expansion of education has two goals:

1. EDUCATION AS AN END in itself, as a basic human right leading to advancement. This implies that resources are used to realize the greatest educational return
2. EDUCATION AS A MEANS of achieving other goals (e.g., national integration and identity). An educated citizenry is more productive and more politically stable.

### Note to Trainer

Write the following on the BOARD, or on a blank overhead:

**EDUCATION AS A MEANS**  
**EDUCATION AS AN END**

## Education Goals and Access Research (cont.)

### Text for Trainer

It appears that choices among different types of educational inputs require more precise knowledge about which educational system will produce the desired results.

### Note to Trainer

Each focus raises some important questions. The trainer should refer to these questions, which can be found in the Participant's Manual on Page 8. The trainer may choose to allow the group to answer these questions individually using the Participant's Manual or in groups of 2 to 4.

### Text for Trainer

Please take about 10 minutes to discuss the following questions, which can be found on Page 8 of your Participant's Manuals. Be prepared to share your observations after your discussions.

1. Who receives education in society?
2. How much education is expected?
3. What type of education is available (academic or vocational)?
4. Of what quality?
5. Which is the better investment?
  - To provide little education to all people.
  - To provide more education to most of the people.
  - To provide a higher quality of education to fewer, more strategically placed people.

## **Education Goals and Access Research (cont.)**

### **Note to Trainer**

Allow ten minutes for group work and then go around and discuss the tentative conclusions of the participants.

### **Text for Trainer**

Now that we have had some time to consider these questions, can we make any conclusions about these important issues? What suggestions come to mind?

## B. Focus of Research

### Text for Trainer

Now that we are familiar with some of the issues let us turn toward research. We should remember that research dealing with these issues does not produce certainty for educational policymakers in developing countries. More information is needed about the causal relationships between education and development. We have just discussed how the expansion of access to education has been driven by two goals:

- 1) The idea that education is an end, that is, a basic human right
- 2) Education as a means of achieving other goals

The research literature we are about to review also focuses on these two goals.

1. **EDUCATION AS AN END** -- This links access and equity as a single concept. Here articles focus on interactions between economic or political inequality and education.

—> *Display Overhead 8*

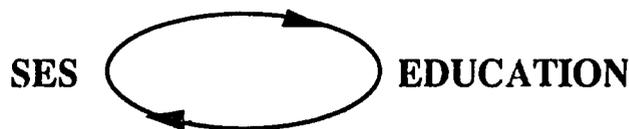
### A. EDUCATION AS AN END

#### FOCUS:

THE INTERACTION OF ECONOMIC AND POLITICAL  
INEQUALITY AND EDUCATION

#### RESEARCH SUGGESTS:

1. SES (Socio-Economic Status) determines access to education
2. Educational attainment determines SES



## B. Focus of Research (cont.)

—> *Display Overhead 9*

### **B. EDUCATION AS A RESOURCE FOR DEVELOPMENT**

#### FOCUS

EDUCATION AS AN INVESTMENT IN HUMAN CAPITAL  
WITH FAVORABLE RETURNS

#### RESEARCH SUGGESTS:

1. The individual/family justifies the expense of education in increased lifetime income
2. Society justifies the expense of education in increased:
  - A. Productivity
  - B. Social Benefits
3. Education is a means to support national identity and unity

#### **Text for Trainer**

2. **EDUCATION AS A RESOURCE FOR DEVELOPMENT** -- This view focuses on analyzing human capital to justify the extension of education to previously excluded groups because it can be demonstrated that education is a good investment with favorable rates of return.

## C. Summary of Research Findings

### Text for Trainer

Now we will go over a summary of the major conclusions of research on access. If you would like to do a more in-depth study of research on access and equity issues, see the bibliography provided at the end of this module.

—> *Display Overhead 10A*

### **SUMMARY OF RESEARCH FINDINGS**

#### **RESEARCH SUGGESTS THAT:**

1. Studies relating access in education to social equity indicate expanding education does not necessarily improve equity  
  
(Education, if distributed unequally, can contribute to inequality.)
2. Studies that relate education to economic and social outcomes show some positive correlations

Educational attainment is linked to:

- A. Increased earnings
- B. Increased productivity
- C. Reduced fertility
- D. Improved family health

## **C. Summary of Research Findings (cont.)**

### **Text for Trainer**

To summarize what we do know, we can say that no research conclusions are available to show that access in education will automatically bring about social change. BRIDGES research has suggested that:

1. Studies that related access in education to social equity indicate that education does not necessarily improve equity. If education is distributed unequally it can contribute to inequality.
2. Studies that related education to economic and social outcomes show some positive correlations. Positive correlations between educational attainment and other desired outcomes include:
  - A. Increased earnings (Behrman & Birdsall, 1983),
  - B. Increased productivity (World Bank Strategies, 1986),
  - C. Reduced fertility and improved family health (LeVine, 1980; Dixon, 1985; Kelley, 1986).

## C. Summary of Research Findings (cont.)

—> *Display Overhead 10B*

### **SUMMARY OF RESEARCH FINDINGS (cont.)**

#### **RESEARCH SUGGESTS THAT:**

3. The complexities of variables and different environments need to be considered when choosing policy options
4. Differences in levels of development, culture and educational histories (colonialism) all affect the equity, economic productivity or national cohesion produced by a particular party

#### **Text for Trainer**

3. Research has shown that consideration must be given to the complexities of variables and environments when choosing policy options.
4. Differences in levels of development, culture, and educational histories (colonialism), all affect the equity, economic productivity or national cohesion produced by a particular policy.

#### **The questions remain:**

- Will expanded and equal access to education increase overall productivity faster and more effectively than concentrated educational investments?
- Would investments in female education, distance education or preschool education have more of an effect than providing access for more children?

#### **Not to Trainer**

Allow for a brief (five-minute) discussion on these two questions.

## C. Summary of Research Findings (cont.)

### **Text for Trainer**

We are faced with the longstanding development debate on the relationship between growth and equity. There are, of course, no correct answers. Answers depend on one's vision of the desired society and what people are willing to do to achieve this.

Research, however, can provide meaningful support for policies that are enacted.

### **Note to Trainer**

Write these questions on the **BOARD**:

1. How are Access and Equity different as ideas?
2. Can you give an example where increasing Access can affect Equity?

## **C. Summary of Research Findings (cont.)**

### **Text for Trainer**

Please take several minutes to consider these two questions. Be prepared to share your conclusions with the group. There is space for you to take notes on Page 11 of your Participant's Manuals.

### **Note to Trainer**

The trainer may choose to allow the group to answer these questions individually using the Participant's Manual or in groups of two to four. Allow five to ten minutes for group work and then discuss the tentative conclusions of the participants.

After discussing the individual or group responses, it is recommended that the trainer allow the participants a five-minute break.

## D. Factors Influencing Access

### Text for Trainer

A number of questions have been raised pertaining to the various factors that influence access to education. They include:

1. How well do governments achieve their goals of universal or equal access to primary education?
2. What is their record of improving retention rates for all groups in their societies?
3. How well do they provide access to secondary and tertiary education?

Let's look at what the research shows.

—> *Display Overhead 11*

## ACCESS AND EQUITY STRIDES

### CHILDREN AGES 6 - 11 YEARS

	<u>1960</u>	<u>1985</u>
AFRICA	32.7*	65*
ASIA	54.4	73.6
LATIN AMERICA	57.7	83.5

\* calculated in percentages

## **D. Factors Influencing Access (cont.)**

### **Text for Trainer**

In general, Africa, Asia, and Latin America have made important strides in providing schooling to their children.

From 1960 to 1985, enrollment rates for children between 6 and 11 years of age increased from 32.7% to 65% in Africa; from 54.4% to 73.6% in Asia; and from 57.7% to 83.5 % in Latin America and the Caribbean.

More important than gross enrollment rates is disparity between groups (equity).

While some children have enjoyed increased access to schooling, others have lagged behind.

Government education policymakers need policy options that both increase gross enrollments and improve equity in the relative enrollment rates of different groups.

In some countries, overall enrollments are low (because resource constraints mean that there simply are not enough places in school for all children) but all groups have equal access to the limited places that exist.

In other countries, children in disadvantaged groups know their chances of attaining access to school are much lower than the chances of other children.

These circumstances pose different options for students and result in different impediments to general economic development.

## D. Factors Influencing Access (cont.)

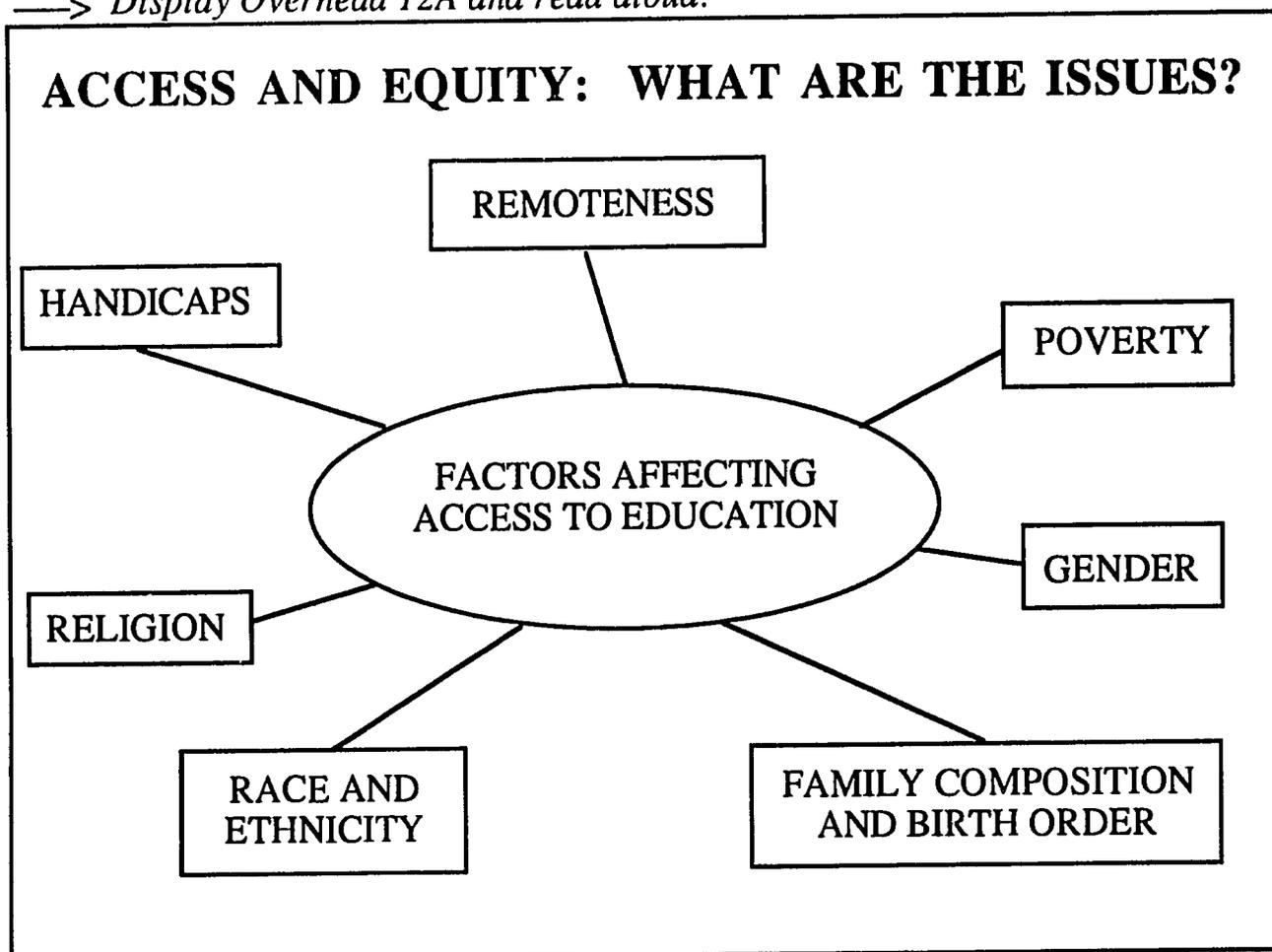
### Note to Trainer

*Overhead 12A* summarizes critical factors that affect access and equity.

### Text for Trainer

**WHAT ARE THE ISSUES?** In order to begin to draw some conclusions, let's take a closer look at the content of these findings. Research gives us a clear idea of what information is relevant to each of these categories.

—> *Display Overhead 12A and read aloud.*



## D. Factors Influencing Access (cont.)

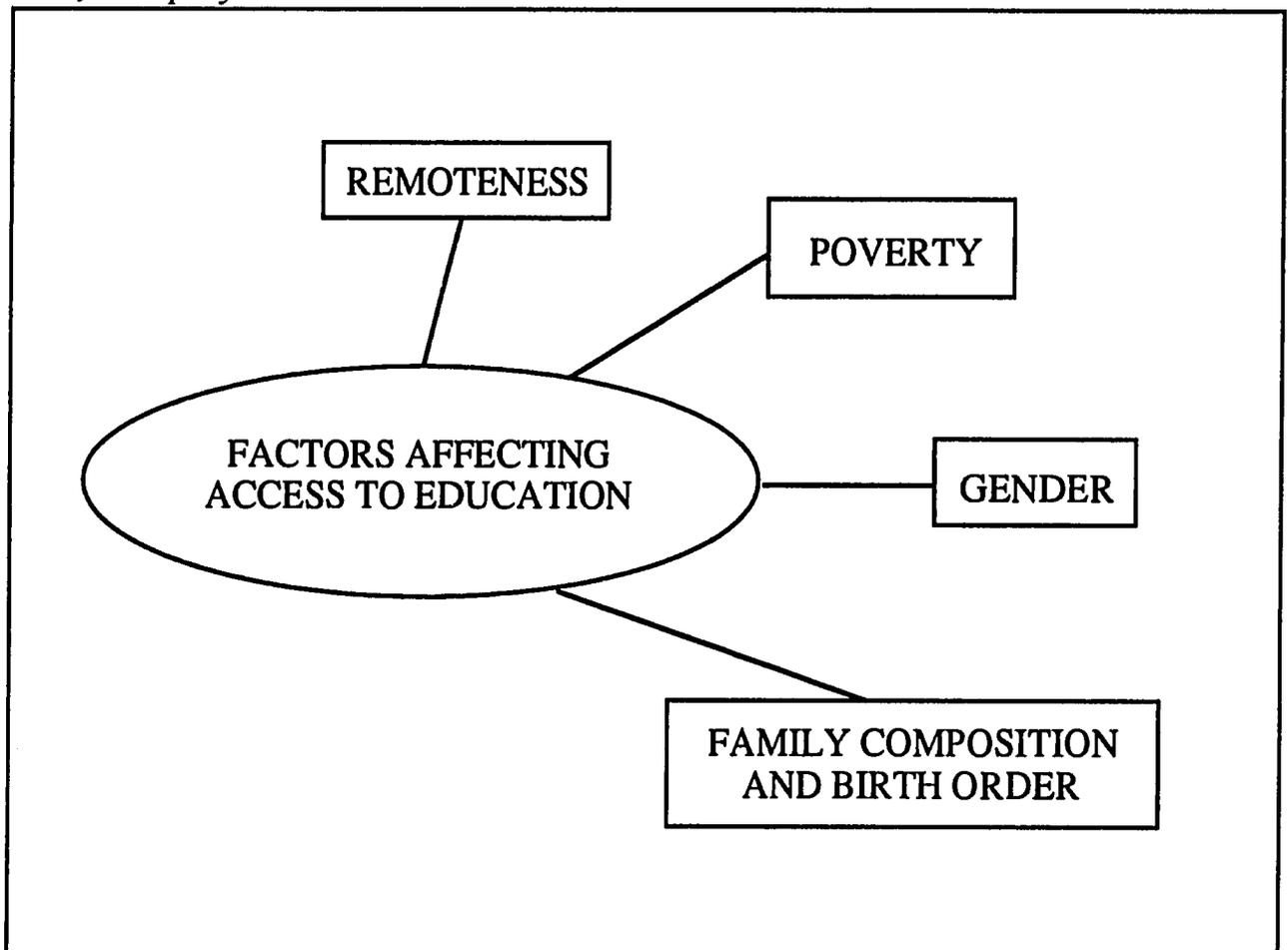
### Note to Trainer

Display *Overhead 12B* and ask the participants to come up with more specific examples of these factors.

### Text for Trainer

Please look at *Overhead 12B* and the factors that affect access to education. For example, how does poverty influence access to education? Can you provide some specific examples of how these factors affect access to education?

—> Display *Overhead 12B*



## **D. Factors Influencing Access (cont.)**

### **Note to Trainer**

Include more specific details taken from the Anderson Report or the other literature. The text that follows discusses other factors that affect access to education. Before moving on to the text, try to elicit as much discussion from the participants as possible on *Overhead 12B*.

### **Text for Trainer**

On Pages 12 and 13 your Participant's Manual contains space for you to take notes as we discuss a number of issues relating to Access and Equity. Let's start with the issue of Remoteness.

#### **REMOTENESS:**

In rural areas there are defined impediments to education:

1. Topography can make it hard to get to school.
2. Different languages of urban and rural people can mean that instruction may not be in the native tongue of certain children.
3. Curriculum designed for urban children may be irrelevant to rural children.
4. Rural children may not be able to afford the time away from household work for school.

#### **POVERTY:**

Poor people have some built-in impediments to education:

1. School fees may be too expensive.
2. Poor children are needed for household tasks and for income, so they may not be able to attend school.
3. Poor children may be malnourished, which affects their abilities to learn when they do attend school.
4. Poor children may not be able to attend regularly and therefore are more often retained in the same grade, which means they stay in school longer.

## **D. Factors Influencing Access (cont.)**

### **Text for Trainer**

#### **GENDER:**

Females face impediments to getting an education:

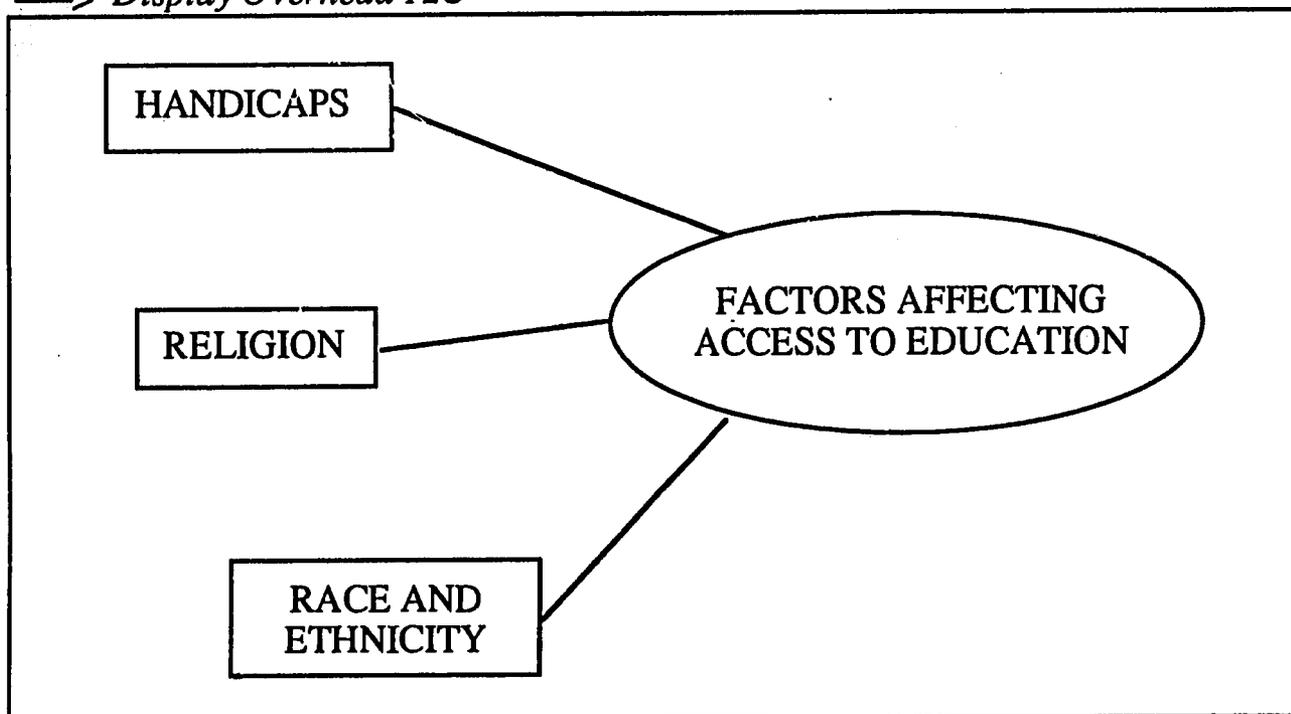
1. Cultural attitudes and social roles may prohibit attendance.
2. Females may be treated differently in school, which may affect their attendance.
3. Females may be expected to work at home and in agriculture, which may not allow time for school.
4. The eventual job opportunities for females may not require education.

#### **FAMILY COMPOSITION AND BIRTH ORDER:**

1. First-born children are often needed at home and may not attend school.
2. Households with more girls may seek to educate the boys first.

## D. Factors Influencing Access (cont.)

→ *Display Overhead 12C*



### Note to Trainer

Repeat the process trying to elicit as much information from the participants as possible regarding *Overhead 12C*.

### Text for Trainer

#### **HANDICAPS:**

Handicapped children are often excluded from schools because of:

1. Lack of programs
2. Lack of facilities
3. Lack of personnel

#### **RELIGION, RACE AND ETHNICITY:**

Different religious, racial, and ethnic groups are both culturally and historically discriminated against.

## **D. Factors Influencing Access (cont.)**

### **Note to Trainer**

Ask participants for examples of discrimination in their countries.

### **Text for Trainer**

Can you think of examples of how discrimination affects access to education in your own countries?

### **Note to Trainer**

Discuss participants' answers briefly, as a group. Try to look for factors that parallel factors already discussed.

## D. Factors Influencing Access (cont.)

### Text for Trainer

If the factors influencing access are known and considered, factors can be combined to influence policy options. Policies can be enacted to affect both the supply of and demand for education:

—> *Display Overhead 13 and read aloud.*

### EXAMPLES OF POLICIES TO AFFECT SUPPLY OF EDUCATION

AIM -----> ACTION

1) Economic Growth

2) Equity

1) Target resources for farmers and females

2) Determine reason for a group's exclusion from school

3) Tailor programs to address all the reasons for exclusion

## D. Factors Influencing Access (cont.)

—> *Display Overhead 14 and read aloud.*

### EXAMPLES OF POLICIES TO AFFECT DEMAND OF EDUCATION

AIM -----> ACTION

1) Make curriculum relevant

2) Increase participation of ethnic minorities and females

3) Enroll poor students

1) Alter curriculum for rural students

2) Recruit and place staff of ethnic minorities and females

3) Subsidize school fees of poor

## **D. Factors Influencing Access (cont.)**

### **Text for Trainer**

These are only some policy options; many more actions are possible.

The literature dealing with the factors influencing access to education is extensive and for the most part conclusive. The eight factors just mentioned are found in enough countries to be of interest to policymakers in general. Research has helped us learn a great deal. The following factors help us illustrate the patterns of educational access we need to understand in order to adjust policies and programs for schooling:

1. Remoteness, poverty and gender consistently affect access to education in developing countries.
2. In all cases access to primary school is more extensive than access to higher levels of education, with the exception of Latin America.
3. In all circumstances girls lag behind boys.
4. A study in Nepal found that for every kilometer a child had to walk to school, the possibility of that child attending dropped 2.5%.
5. Of every 100 girls born to poor, rural parents, only five will complete the fourth year of primary school.
6. It costs more to provide schooling for rural areas because of the necessity of incentive pay for teachers.

**[Continued on next page]**

## **D. Factors Influencing Access (cont.)**

### **Text for Trainer (continued)**

7. About 40% of primary age girls, and almost 60% of girls 15-19 are out of school.
8. Girls are more often malnourished than boys, and hence suffer more in terms of poor school performance.
9. Discrimination is sometimes explicit, as when schools are designated by race, ethnicity or language.
10. Countries differ widely in how they provide for the handicapped and how they try to provide for "children in motion."
11. One finding of interest was that schooling succeeded when teachers were recruited from the same nomadic, tribal, or ethnic group as the children they were to teach.

## **D. Factors Influencing Access (cont.)**

### **Note to Trainer**

**BREAK** should be announced.

#### **If this is a One-Day Session:**

- Conduct a short question and answer period for those interested in more detailed information.
- Refer them to the evaluation form at the end of their Participant's Manuals and ask them to fill it out before leaving.
- Ask participants to spend 15 minutes reading the case and then return to the session.

#### **If this is a Two-Day Session:**

- Ask participants to read the case before returning to the session the next day at time.

## **PART III: The Kenya Case Study: Policy Options on Access to Schooling**

### **TABLE OF CONTENTS**

**Part A: Kenya at a Glance**

**Part B: Disparities and Inequities in Education**

**Part C: Process of Planning and Policymaking in Education**

**Part D: Policies Enacted in Education since Independence that Influence Access to Schooling**

**Part E: Conclusion**

## **Part A: KENYA AT A GLANCE**

### **BASIC FACTS:**

**Independence from Britain:** December 12, 1963

**Area:** 582,646 square kilometers or 224,961 square miles

**Geographic Location:** Lies across the equator on the eastern seaboard of Africa. Borders the Indian Ocean, stretching from the Somalia border in the north for 380 miles to Tanzania in the south.

**Frontiers:** Borders Somalia to the east, Ethiopia to the north, Tanzania to the south, Uganda to the west and Sudan to the northwest.

**Population:** 21.4 million (August 1989 census)

**Capital City:** Nairobi, population approximately 1.5 million

**Territorial Demarcation:** Eight provinces - Coast, Central, Eastern, Nairobi, Rift-Valley, Western, Nyanza and North-Eastern. The provinces are further divided into 41 administrative districts.

**Cultural characteristics:** 41 different tribes, each having its own language. Some groups can understand each other's language.

**Official Language:** English (for official business and instruction in schools)

**National Language:** Kiswahili (a blend of Arabic and some of the coastal tribal languages)

**Expenditure in Education:** Approximately 38% of total government expenditure

**Educational System:** 8-4-4, meaning 8 years of primary school, 4 years of secondary school, 4 years of university

**Domestic Economy:** The Gross Domestic Product (GDP) was estimated to be 4.5% in 1990. Inflation was 12.6% in 1990 but rose to 17.1% by March 1991 and again rose to about 21.2% by October 1991.

**Employment:** In 1990 an estimated 1.9 million persons were engaged in both the modern and informal sectors of the economy. Employment rate in the public sector fell from 3.8% in 1989 to 1.2% in 1990. A great number of graduates continue to remain unemployed due to the slowing down of employment in the public sector.

## Part B: Disparities and Imbalances in Education

At independence Kenya inherited an educational system that was highly elitist, segregated according to race and inadequate for its workforce needs. There were different systems for Europeans, Asians, Indians, Goans and Africans. Primary education was compulsory for all European and Asian children between the ages of 7 and 15, but not so for children from the other ethnic groups.

Soon after independence the government considered expansion of African education as a priority. This meant that all schools would be desegregated and that new schools would have to be constructed. The government had limited resources to meet the demand, and called for community participation on the basis of the national motto, "Harambee," meaning "pulling together." A commission was also set up to review the existing educational resources and advise in the formulation and implementation of educational policies.

The Ominde Commission Report of 1965 and other government documents written at independence all outline the broad educational objectives as:

- a) Education must serve to foster national unity.
- b) Education must prepare and equip the youth with knowledge, skills and expertise to enable them to play an effective role in the life of the nation.
- c) Education must serve the needs of national development.
- d) Education must provide for the full development of talents and personality.
- e) Education must promote social justice and morality, social obligations and responsibilities.
- f) Education must foster positive attitudes and consciousness towards other nations.

Kenya takes great pride in its educational expansion at all levels since independence, as is shown in Table 1:

<b>Year</b>	<b>Primary School Total Enrollment</b>	<b>Secondary School Total Enrollment</b>
1963	891,553	3,021
1973	1,816,170	174,167
1983	4,343,921	493,710
1988	4,843,320	458,712

Source: Report of the Presidential Working Party on Manpower Training and Development for the Next Decade and Beyond, March 1988.

## **Disparities and Imbalances in Education (cont.)**

The national participation rate in primary school is 94%, which implies that Kenya has almost achieved universal primary education. However, there are still areas of low participation rates. The lowest rates are found in the arid and semi-arid areas of northern Kenya. In some areas, participation is greater than 100% due to increased repeater rates.

While the objectives and policies of education have enabled the nation to make great strides in educational development and to provide trained manpower for the economy, disparities and inequities still exist. The government has made efforts to reduce the imbalances in access to schooling that existed at independence, but experience shows that the former European schools now simply serve the richer segment of the Kenyan community. These tuition-based schools have substantially better facilities than the schools for children from the lower socio-economic levels with "free tuition" but inferior facilities. Scores in national examinations reflect these disparities.

At the secondary school level, the schools are categorized into national schools, provincial schools and district schools. The national and provincial schools are government-maintained and have good facilities while the district schools are run mainly by the communities. Some of the district schools receive assistance from the government, particularly in terms of teachers, but the facilities are in many cases inadequate. The consequence of this categorization is that some privileged children receive quality education while those attending the less-privileged, government-assisted schools acquire a low quality education. The majority of the students that advance to the university level are from the national and provincial schools.

Of particular importance and concern to educators are the observed low levels of participation of girls in some areas. As a national average, 48% of the students at the primary school level are girls, but there are areas where the percentage of girls is as low as 24%.

## Disparities and Imbalances in Education (cont.)

Dropout rates are high in Kenya, particularly for girls. Of the girls that begin primary school, only 34.1% complete this phase of education, compared to an average of 41.3% for boys. The disparities are displayed in Table II:

**Table II - Completion Rates**

<b>Province</b>	<b>Male</b>	<b>Female</b>
Central	51.4	50.2
Coast	44.1	31.6
Eastern	40.7	35.7
North-Eastern	23.5	12.0
Nyanza	37.7	26.3
Rift Valley	37.6	29.2
Western	39.9	33.0
Nairobi	60.6	61.1

Source: Kenya: The Role of Women in Economic Development, A World Bank Country Study, World Bank, 1989, p. 37.

Girls have also been at a disadvantage at the secondary level in Kenya. At independence there were 151 secondary schools, most of which were for boys only. As the demand for secondary education grew, the communities built new secondary schools in almost all areas to serve the local children. Most are co-educational, and the majority of girls attend these less-advantaged, government-assisted schools for two reasons:

- a) The performance of girls in national examinations is generally poorer than that of boys; since selection to government-maintained schools is limited, girls are accepted less often.
- b) The number of single sex schools for girls is still fewer than those for boys.

Thus, a serious educational handicap remains for girls. In the government-maintained schools, girls make up approximately 35.4% of the student body, while in the government-assisted schools they make up 44.4% (World Bank, 1989).

## **Part C: Process of Planning and Policymaking in Education**

The Ministry of Education is solely responsible for the promotion of education in the entire country, as stipulated in the Education Act of 1968. The Central Ministry has offices in Nairobi and has provincial officers of education in each province, commonly known as PEOs, and district officers known as DEOs. The field officers are responsible for ensuring that the policies stipulated by the central ministry are implemented effectively in each district.

## **Part D: Policies Enacted in Education Since Independence that Influence Access to Schooling**

All of the policies that have been enacted since independence have been directed towards increasing access to schooling and reducing inequities. These inequities have been caused by factors such as:

- remoteness
- "children in motion"
- poverty
- gender
- intra-family composition and birth order
- race and ethnicity
- religion
- special education needs

Some of the government policies are discussed below:

### **1) Remoteness and "Children in Motion" -- Boarding School Policy**

In the rural areas, children have had to travel long distances to go to school. Because of this more children drop out or are exhausted by the time they reach school, and their learning capacity is severely hampered. Soon after independence the Kenyan government constructed new primary schools closer to the children. Because of this policy, children in densely populated rural areas now travel only two kilometers or less to get to school.

In the arid and semi-arid areas of the country, another problem exists. Pastoral, nomadic tribes such as the Turkana, Samburu and the Kenyan Somali live here. Their children have been referred to by Anderson (1988) as "children in motion."

## **Policies Enacted in Education Since Independence that Influence Access to Schooling (cont.)**

Attempting to improve on their participation rates in school, the government decided to construct boarding schools for the children so that they would not have to travel long distances. These boarding schools did not succeed for two main reasons:

- a) The newly-built schools had neither furniture nor linens; children were expected to bring their own, the costs of which were prohibitive for their communities. As a result, richer families from other areas brought their children to these schools, defeating the initial purpose of the policy.
- b) Some of the families feared the schools would alienate their children from the traditional way of life and therefore did not take advantage of them.

### **2) Poverty**

#### **A. Free Tuition Policy**

Soon after independence, the President of the Republic announced that primary schooling would be "free" to increase access to basic schooling. The policy began in 1972 when school fees were waived for famine-stricken areas, and special grants were given to destitute families with respect to school fees (Ministry of Education, Annual Report, 1972). This waiver continued in the poorer areas until the president formally announced free primary education for grades 1-4 beginning January 1974. Enrollment increased as a result of this policy, with the exception of the poorer children, for whom the costs to cover school activities, uniforms, examinations, writing materials, transport, lunches, and furnishings for rooms in boarding schools continued to be prohibitive (Nkinyangi, 1982 as reported by Anderson, 1988). "Free education" may have created higher entry rates, but these extra costs led to lower retention rates and higher dropout rates.

#### **B. School Milk Policy and School Feeding Policy**

On Independence Celebration Day in 1978, President Daniel arap Moi announced that beginning in 1979, the government would provide free milk to all those in primary school. The program was implemented in 1979 when some 3.7 million children benefited. By 1987 more than 5 million children were receiving free milk at school. The success of this program encouraged the government to introduce a School Feeding Program beginning in January 1981. The School Feeding Program provides a mid-day meal five times a week to primary school children, mainly in the arid and semi-arid parts of the country. Both of these policies have been successful in improving the nutritional and health levels of the children, and enrollment rates have increased in some of the less-developed areas.

## **Policies Enacted in Education Since Independence that Influence Access to Schooling (cont.)**

### **3) Intra-Family Composition and Birth Order**

Most Kenyan families cannot afford to send all of their children to school and a choice has to be made as to who will be allowed to attend. The majority of families send their eldest children to school but families sometimes enroll the younger children while the older, stronger ones do much-needed work at home. The intra-family factors that affect access to schooling are complex and intertwined (Anderson, 1988).

### **4) Race, Ethnicity and Religion**

The policy to desegregate schools was clearly spelled out in the Education Act of 1968. All government schools in Kenya admit children irrespective of race, ethnicity or religion and offer the Kenyan system of schooling to all children. Prior to independence the majority of primary and secondary schools had a religious base or had been founded by a group of missionaries. Those that were not religiously affiliated were started by the government, run by local county councils, and were referred to as District Education Board (DEB) Schools. Since the Education Act of 1968 schools have become very flexible, allowing students of other religions to attend religiously affiliated schools.

### **5) Handicapped People and the Needs for Special Education**

The Kenyan government has shown great concern in the provision of services to improve the welfare of the disabled persons in the country. Soon after independence, the government appointed a Committee on the "Care and Rehabilitation of the Disabled" to study and advise on the numbers and types of disabled persons, facilities for education, training and employment, and to formulate broad programs of training and placement of the disabled. The Ministry of Education also established a Special Education Inspectorate section and administrative unit for the purpose of effective management and supervision of special education programs. 1980 was declared the Year of the Disabled, and money was raised to establish a national fund for the disabled. The Kenya Institute of Special Education (KISE) was built specifically to train and rehabilitate disabled persons.

Source: Report of the Working Party on Education and Manpower Training for the Next Decade and Beyond, March 1988.

## **Part E: Conclusion**

It is difficult to include all the policies that have helped shape education in Kenya in as short a paper as this one. However, it is important to note that while Kenya has experienced great success in achieving a national participation rate of 94% in primary schools, the rates for girls and for those children in arid and semi-arid areas remain low. This is an indication that several overlapping factors influence access to schooling in Kenya. Policymakers need to understand all these factors in order to devise appropriate policies for improving access to schooling (Anderson, 1988).

## **Part IV: Understanding Access, Equity and Gender Issues: A Case Study**

### **Note to Trainer**

To prepare for Part IV, the trainer will have read the Kenya case thoroughly and have a strong mental outline of activities and relevant issues.

1. The trainer and the participants can use the SUMMARY OF THE CASE -- INDIVIDUAL WORK SHEET to take notes while they are reading the case. This can be found in their Participant's Manual on page 14.
2. Before beginning, make sure the participants have read the case study in advance, either during the break or before the workshop.
3. If they have not, give them 5 to 10 minutes to familiarize themselves with the case.
4. Then divide participants into working groups of about 6-8 people. This can be done by:
  - Counting off the number of people needed in each group
  - Passing out cards made in advance, marked A, B, C, etc.
  - Allowing the participants to form their own working groups

## **A. Group Activity A**

### **Text for Trainer**

Our first activity involves use of the information we learned in the Kenya case study. In this activity we will work in groups.

**[Divide the participants into groups at this time]**

This activity requires use of the chart labelled "Case Study of Kenya: Group Activity A" on Page 15 of your Participant's Manual.



## A. Group Activity A (cont.)

### **Text for Trainer**

Our first task is to use the information given from the Kenya case study to work in groups to identify:

- Part A. Trends in opportunities for education;
- Part B. Trends in participation rates among certain groups;
- Part C. Policies that have been enacted;
- Part D. Conclusions about access and equity efforts and results.

Is everyone clear on what the task is?

### **Note to Trainer**

Rotate to each group and make sure they are clear about the task at hand. Point out which sections of the case correspond to particular statements.

Groups work for 15 minutes.

### **Text for Trainer**

To complete this activity, each group should assign one member to each of the following tasks: a facilitator, a timekeeper and a recorder.

The **facilitator** moves the group through the exercise; the **timekeeper** makes sure the group spends five minutes on Parts A-C and ten minutes on Part D; the **recorder** keeps notes for presentations of Parts A-D.

### **Note to Trainer**

To bring the group back together, the trainer calls on one group to present information on Parts A and B, and a second group to present on Part C. Then each group is given 5 minutes to present critical information for each part.

Part D is most important; the most time should be spent on presenting and explaining conclusions.

## **B. Group Activity B: Creating a Chart of Policy Options and Research Questions**

### **Note to Trainer**

The trainer's text for this section is taken from the following outline.

—> *Display Overhead 16*

### **CASE STUDY OF KENYA: GROUP ACTIVITY B**

#### **Creating a Chart of Research-Based Policies:**

<b>Goals of Education System</b>	<b>Factors that Affect Access, Equity, Gender</b>	<b>Policy Options to Increase Access &amp; Equity</b>

## **B. Group Activity B: Creating a Chart of Policy Options and Research Questions (cont.)**

### **Text for Trainer**

Review your notes, handouts and other information previously presented from BRIDGES research and policy options. Charts A and B, located at the back of your Participant's Manual, are particularly helpful.

Divide into groups again and discuss:

- A. GOALS** of the educational system
- B. FACTORS** that affect access, equity and gender
- C. POLICY OPTIONS** to increase access and equity

## **B. Group Activity B: Creating a Chart of Policy Options and Research Questions (cont.)**

### **Text for Trainer**

I would like each group now to draft a summary of its findings, showing Parts A-C. You can note this information in your Participant's Manual during the group discussion.

### **Note to Trainer**

The trainer may decide to post a time schedule on the BOARD:

#### **TIME GUIDELINES**

**GOALS of the system -----> allow 5 minutes**

**FACTORS affecting access -----> allow 5 minutes**

**POLICY OPTIONS for the Kenya Case -----> allow 15 minutes**

### **Note to Trainer**

Bring the group back together and allow five minutes for each group presentation.

Ask the participants to write down questions that can be answered after each presentation.

## C. A Summary Chart of Kenya Case Study

### Note to Trainer

This last exercise can be done together as a group or small groups can break up and work together.

### Text for Trainer

The object of this exercise is to integrate the information gathered from the rest of the module. Using this format we will analyze policy options. We want to know: What are the pros and cons of policy options? What information is needed? What are recommended actions?

### Note to Trainer

Display *Overhead 17* and elicit information from the group on the following factors:

—> *Display Overhead 17*

CASE STUDY OF KENYA: GROUP ACTIVITY B					
ACCESS FACTORS	RELATED POLICY	PROS	CONS	INFORMATION NEEDED	RECOMMENDATIONS

## C. A Summary Chart of Kenya Case Study (cont.)

### Text for Trainer

Please complete the "Case Study of Kenya: Group Activity B" by examining the impacts of instituting a school feeding program.

### EXAMPLE:

—>Display Overhead 18

CASE STUDY OF KENYA: GROUP ACTIVITY B					
ACCESS FACTORS	RELATED POLICY	PROS	CONS	INFORMATION NEEDED	RECOMMENDATIONS
POVERTY	school feeding	poverty teach- ability	cost	cost benefits	collect data to study effects

### Note to Trainer

Allow 10 minutes for this summary section and allow 5 minutes of components on the case study process/group work. Ask for comments on its strengths and weaknesses.

## **Part V: CONCLUSION**

### **Note to Trainer**

Refer back to the outline and show the group the stages of the module.

—> *Display Overhead 19 and read Text for Trainer.*

#### **Part I: Introduction**

- A. Why are we talking about access in education?
- B. Group Activity: Assessing Expectations and Resources
- C. What are the Issues?
- D. An Effort at Access and Equity: Pakistan

#### **Part II: Education Goals and Access Research**

- A. Expansion of Access to Education
- B. Focus of Research
- C. Summary of Research Findings
- D. Factors Influencing Access

#### **Part III: Kenya Case Study: Policy Options on Access to Schooling**

#### **Part IV: Understanding Access, Equity & Gender Issues: A Case Study**

- A. Group Activity A
- B. Group Activity B
- C. Summary of the Kenya Case Study

## CONCLUSION (cont.)

### **Text for Trainer**

**Part I** provided the details of BRIDGES research which has helped us to understand:

1. Access research related to goals of education.
2. The critical factors to consider when discussing the ideas of access and equity.
3. Some details on the multiple effects of single policy options.

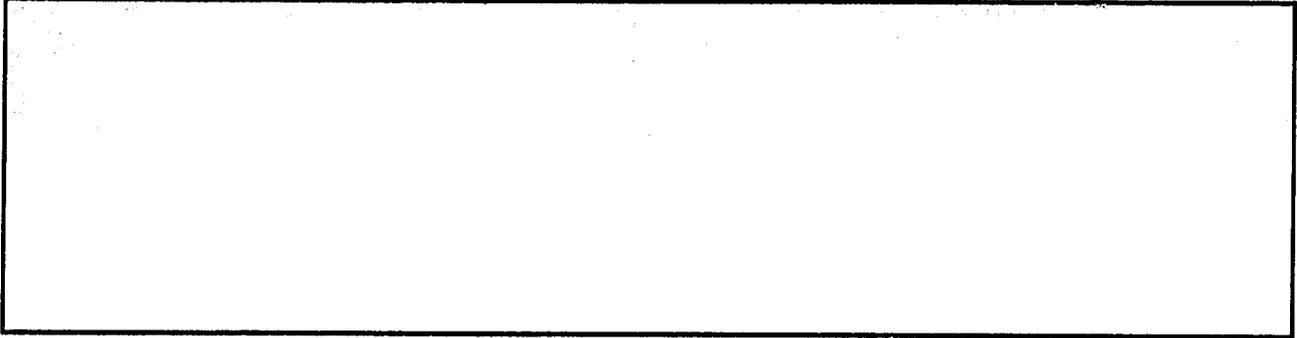
**Part II** combined a description of research with a process for considering policy options.

**Part III** used a case history to illustrate the complexities of access and equity issues in a single context.

The case of Kenya helps show how planning and policies can work to deal with the factors identified in research studies.

## CONCLUSION (cont.)

—> *Display Overhead 20: Chart B and read the first entry aloud.*



### **Text for Trainer**

Future policies can be drafted to speak to the needs of particular groups.

Can you provide me with any evidence that supports these particular policy options over other options, along with supporting research and implementation costs?

**[Pause for comments]**

Finally, the next step is you, the participants, to use the contents of this module to inform future planning and policymaking so it provides access and equity in education. Before you leave please take five minutes to write down three ways you hope to use what you learned on Page 18 of your Participant's Manual. You can use the bibliography at the end of this module to assist future efforts.

Also, please fill out the Module Evaluation form at the end of your Participant's Manual.

### **Note to Trainer**

Field any questions the participants may have.

## MODULE EVALUATION

Please take a few minutes to complete this simple evaluation at the end of the module presentation. Responses will remain anonymous and you may hand in your completed assessment to any member of the HIID team.

MODULE NAME:

Name (OPTIONAL): \_\_\_\_\_

Institutional Affiliation: \_\_\_\_\_

Address: \_\_\_\_\_ City/Town: \_\_\_\_\_

PLEASE RATE THE MODULE ON A SCALE OF 1 (lowest) TO 5 (highest)

	1	2	3	4	5
CONTENT	1	2	3	4	5
STYLE OF PRESENTATION (LAYOUT/DESIGN)	1	2	3	4	5
CLARITY OF CONTENT PRESENTED	1	2	3	4	5
RELEVANCE TO TEACHERS AND SCHOOL ADMINISTRATORS	1	2	3	4	5
RELEVANT TO POLICYMAKERS AND PLANNERS	1	2	3	4	5
USEFULNESS TO YOUR PROFESSIONAL NEEDS	1	2	3	4	5
OVERALL (GENERAL EVALUATION OF THE MODULE)	1	2	3	4	5

Use the space below to write a short paragraph suggesting how best to improve the format and presentation of the current module.

Please comment on the strengths of the module that you noted during the presentation.

# Glossary

## **Access**

Access means children have both the opportunity to attend school and the means to participate in school. Opportunity refers to the supply of educational resources such as schools, instructional materials and teachers. Participation refers to the demand for educational opportunities when they are available.

## **Accountability**

In educational terms, the assignment of responsibility for the accomplishment of goals and objectives. The use of external assessment devices to insure norms and goals are being followed and met.

## **Administration (School System)**

Those individuals charged with the performance of executive duties for the school system on a nationwide basis.

## **Administration (School Building)**

Those individuals assigned to the leadership position within a single school building. The job description generally relates to the execution of curriculum, personnel and public affairs objectives as distinguished from policymaking assignments.

## **Autonomy**

The quality or amount of self-governance assigned to an individual school or school system.

## **Budget**

A statement of the financial position of an administration for a definite period of time based on estimates of expenditures during the period and proposals for financing.

## **Cluster Concept**

A strategy to link dispersed and isolated schools together so that they can share experiences and resources.

## **Glossary (cont.)**

### **Collaborative Learning**

The process of a group of students working together to attain a collective educational goal.

### **Commitment**

The willingness of individuals united by a common educational system to work together for the improvement of the system.

### **Curriculum**

The unified set of courses offered by an educational institution or one of its branches.

### **Equity**

Equity means that there exist no differences in levels of enrollment and/or achievement between children as a function of gender, social class, race, location of residence (urban vs. rural), language or other factors.

### **Feedback**

The process of returning evaluative or corrective information about an action.

### **Implementation**

The actual putting into practice of a projected school reform.

### **Implementors**

Those groups or individuals within a school system charged with the responsibility or obligation of guiding a reform into movement.

### **In-Service**

Additional and ongoing training designed for school staff members to enhance and improve their skills.

### **Internal Efficiency**

The measure of processes within an educational system that can be improved so that all effort and resources result in an acceptable finished product.

## **Glossary (cont.)**

### **Management (School)**

The act of directing a school through leadership and organization.

### **Participation**

The act of involvement or sharing in the common goals of a school system.

### **Quality**

The degree of excellence in schools that is determined by the level of student achievement.

### **Reform (School)**

An attempt to make changes within a school system that will have a positive impact in creating an improved learning, working, or fiscal environment.

### **School System**

The umbrella organization that holds the responsibility and policymaking obligation for all schools within its control.

### **Simulation**

The imitative representation of an aspect of an educational system by setting up a theoretical situation.

### **Teacher Training**

The educational program designed to fulfill national proficiency requirements and produce effective, efficient, dedicated teachers.

## Chart A

Objective	Project/ Sub-Project	Research	Impact (High, Medium, Low) (Groups Affected by Project)	Implementation (High, Medium, Low Cost) (Difficulty of Implementation)
ACCESS	Build fewer new schools; expand, repair existing buildings	Anderson, 1988 Munoz/Arrive, 1987 (6 countries)	High P, R	High cost; Medium degree of difficulty if materials are available
RELEVANCE OF EDUCATION	Curriculum reform; programmed texts for students	Montero-Sieburth, 1989; Lockheed and Verspoor, Chap. 3, 1989	High	High start up costs; Medium degree of difficulty
IMPROVE RESOURCE EFFICIENCY	Mobilize community support: open houses, parent conference, PTO's	Montero-Sieburth, 1989; Mun C. Tsang, 1988 (4 countries)	High G, M	Low cost; Medium degree of difficulty
MOBILIZE ADDITIONAL RESOURCES	Teacher recruitment and deployment	Anderson, 1988 Munoz/Arrive, 1987 (3 countries)	High P, G	Training costs high; deployment costs low; easy to implement
QUALITY OF EDUCATION	Increase instructional time: use of paraprofessionals and volunteers	Montero-Sieburth, 1989; Lockheed and Verspoor, Chap. 3, 1989	High P, G, R	Low cost; Medium degree of difficulty
	Increase instructional time: require a minimum number of hours in reading and math	Montero-Sieburth, 1989; Lockheed and Verspoor, Chap. 3, 1989 (3 countries)	High P, G, R	No cost; easy to implement
	Increase instructional time: attendance guidelines	Montero-Sieburth, 1989; Lockheed and Verspoor, Chap. 3, 1989 (3 countries)	High P, G, R	No cost; easy to implement

**POLICIES IN ACCESS AND EQUITY IN EDUCATION**

By E.D. Harris Stefanakis

P = Poverty  
G = Girls

R = Remote  
M = Minorities

+ = positive effect  
- = no effect

**CHART B**

***INCREASE SUPPLY***

<b>OPTIONS WHERE DONE</b>	<b>HOW DONE</b>	<b>TARGET P G R M</b>	<b>PROS</b>	<b>CONS INEFFECTIVE CONDITIONS</b>	<b>EFFECTIVE CONDITIONS</b>	<b>INFORMATION NEEDED</b>
1) <b><u>CONSTRUCTION</u></b> Six Countries	Build Plants Use local resources Map Location Fix plants	+ - + -	Brings school to remote Involves community Permanent impact	Very costly Takes time Needs labor, materials, staff, resources	With \$\$\$ When few schools When community asks Needs repairs	Cost Labor Other available materials
2) <b><u>TEACHER RECRUITMENT &amp; DEPLOYMENT</u></b> Three Countries	Recruit grads Train Deploy to areas of need	+ + - -	Improves female attendance & employment Uses locals as teachers	Needs plant, materials Cost of identifying, training	With teacher surplus If training is available	Cost of training Deployment Teachers' effectiveness
3) <b><u>MULTIPLE SHIFTS</u></b> Nine countries	AM & PM shift PM for girls PM for farmers	+ + - +	Savings 25-30% Uses plant & staff Saves capital teacher cost Increases teacher income Fewer hours, helps poor	Higher maint. Extra storage Extra class needs: custodian \$\$ materials \$ Relies on teacher/parent cooperation	Overcrowding Teachers want income Parents willing Community support Limited budget Short term transition step	Parent/teacher cooperation Effect on students If needed long or short term

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**CHART B Continued**

**INCREASE DEMAND**

OPTIONS WHERE DONE	HOW DONE	TARGET P G R M	PROS	CONS INEFFECTIVE CONDITIONS	EFFECTIVE CONDITIONS	INFORMATION NEEDED
4) <u>REDUCE DIRECT COSTS</u> Eight countries	State pays fees, books Transportation Scholarships	+ + + +	Impacts all Tailor to countries Enrolls Incentives econ. dev.	Need secondary schools Long term Financial drain Selection?	As incentives To focus When trans. easily done When parents value ed.	Cost per pupil Transportation costs No. of students needing \$\$\$ Funding sources
5) <u>REDUCE INDIRECT COSTS</u> Three countries	Revise calendar Allow child labor Do Childcard	- + + - +	Helps poor girls Less costly Pay direct Benefits	Remote out Cost care Which are relevant costs? Can be unclear	same as above	same as above
6) <u>MOBILIZE COMMUNITY SUPPORT</u> Four countries	Involve parents Conferences Open houses Media ads	- + - -	Can help parents value education Parents are resources Costs low	Hard to measure effect Time it takes parent Teacher cooperation	In small community When parents value ed. When all teachers want it Leadership	Community support Financial support Schedules Parents/school attitudes Leadership

—>Overhead 1

MANY COUNTRIES HOLD A POLICY COMMITMENT TO  
PROVIDE UNIVERSAL ACCESS TO EDUCATION

"To all citizens...regardless of wealth, location, age, sex,  
religion or ethnic group."

(MALAKPA, 1986, UNESCO, FOURTH CONSULTATION, 1985)

## **COMPONENTS OF THIS POLICY ARE:**

1. TO EXTEND ACCESS
2. TO EQUALIZE ACCESS
3. TO IMPROVE AND EQUALIZE THE QUALITY OF EDUCATION
4. TO IMPROVE AND EQUALIZE RETENTION RATES AND OPPORTUNITIES FOR PROMOTION OF ALL GROUPS
5. TO IMPROVE AND EQUALIZE THE CHANCES FOR SUCCESSFUL EMPLOYMENT

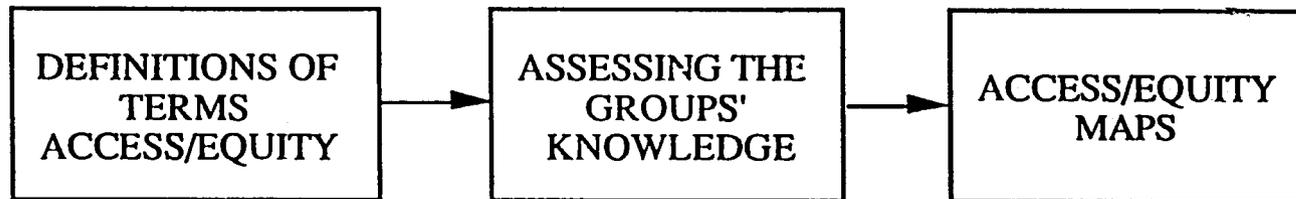
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**ATTN:**  
OVERHEADS 3A THROUGH 3D ARE  
IMAGES OF SCHOOLS

16

# ACCESS/EQUITY ISSUES ARE DESCRIBED

## PART I. INTRODUCTION

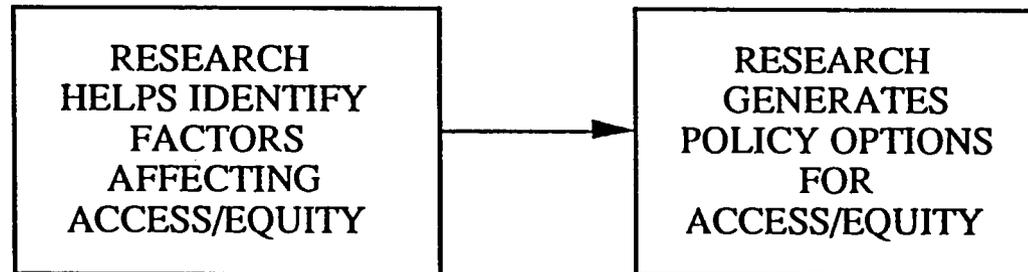


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—>Overhead 4B

# ACCESS/EQUITY ISSUES ARE DESCRIBED

## PART II. EDUCATION, GOALS AND ACCESS RESEARCH

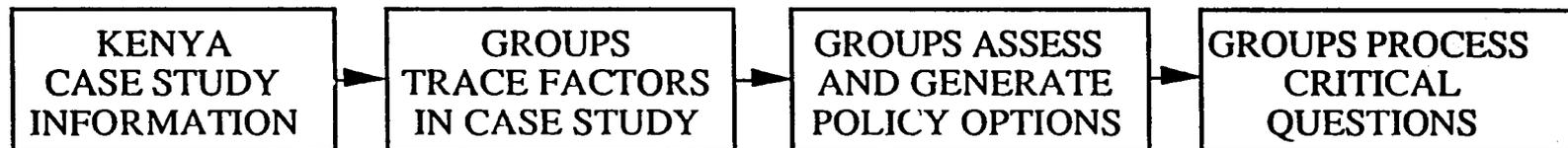


4B

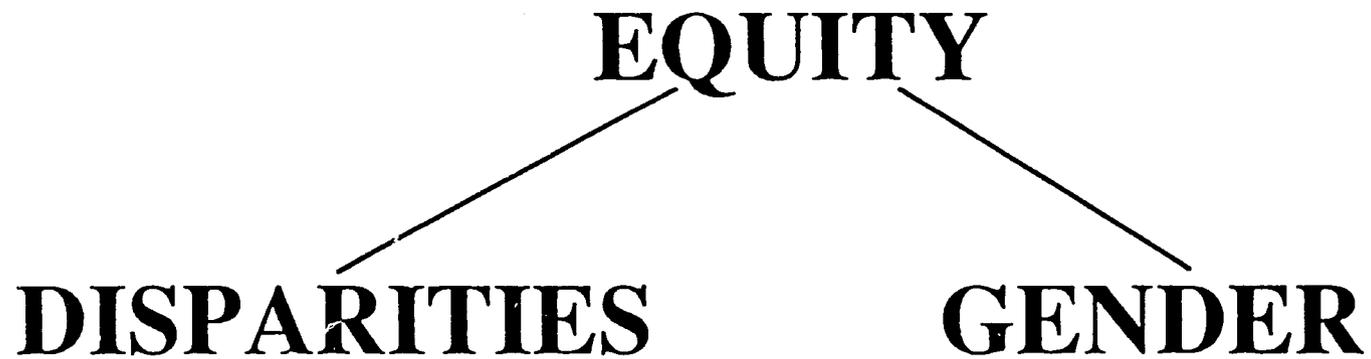
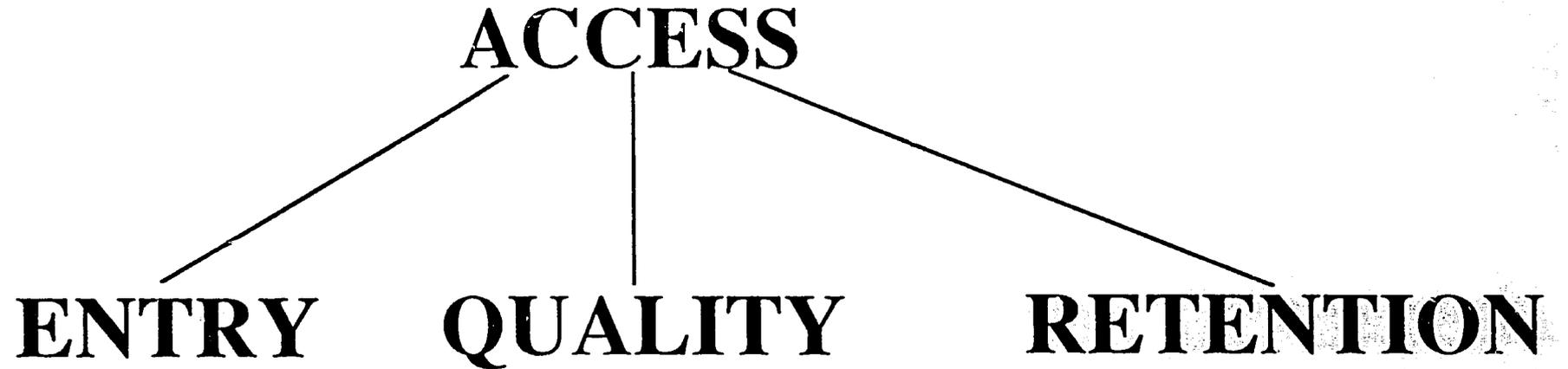
—>Overhead 4C

## ACCESS/EQUITY ISSUES ARE DESCRIBED

### PART III. ACCESS, EQUITY AND GENDER ISSUES: A CASE STUDY



**DEFINITIONS**



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—>Overhead 6

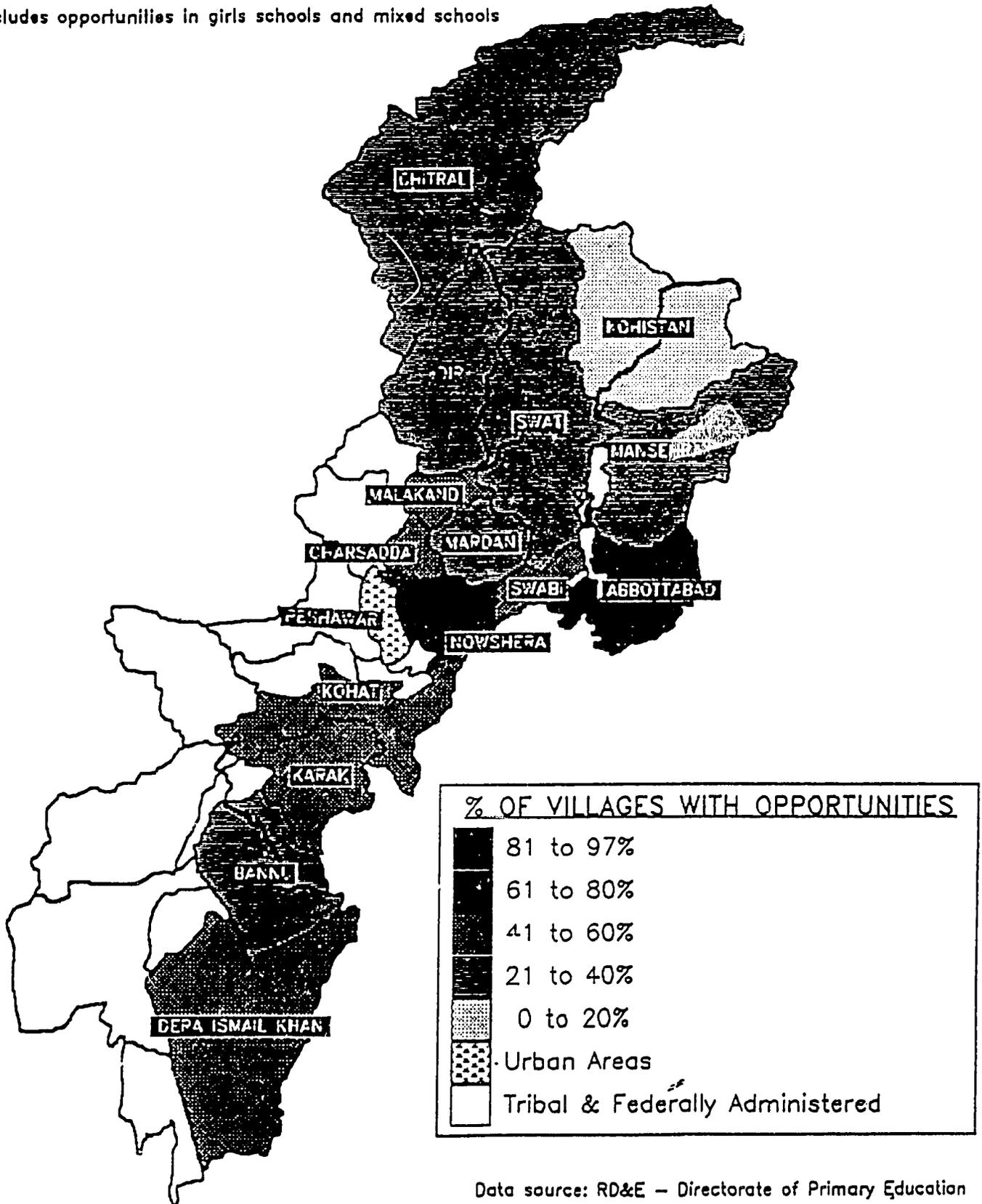
**NORTHWEST FRONTIER PROVINCE  
HUMAN RESOURCE SURVEY - SEMI RURAL AREAS**

# NORTHWEST FRONTIER PROVINCE

## HUMAN RESOURCE SURVEY — SEMI RURAL AREAS

### OPPORTUNITIES FOR GOVT PRIMARY EDUCATION FOR GIRLS BY DISTRICT

• Includes opportunities in girls schools and mixed schools



Data source: RD&E — Directorate of Primary Education

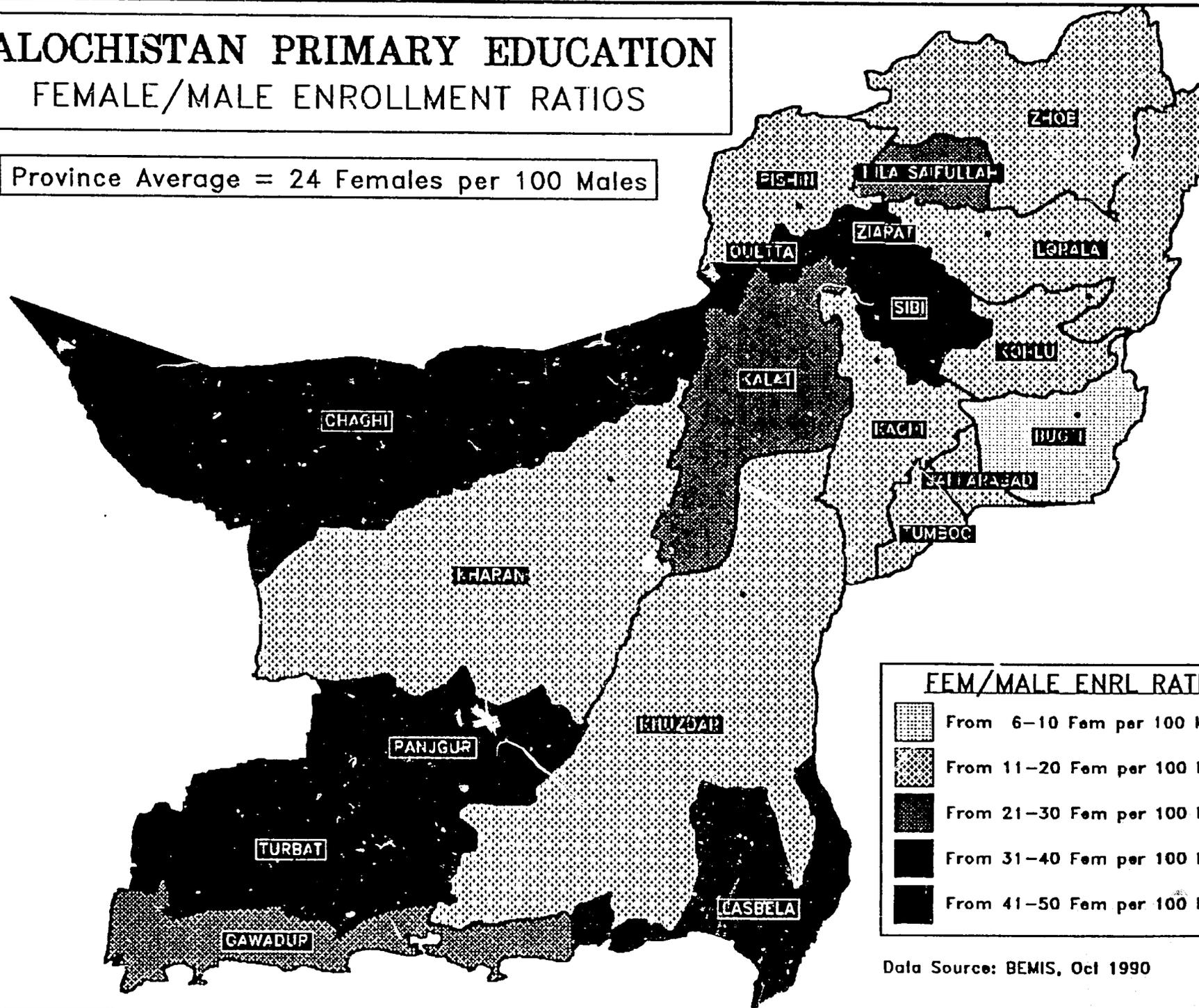
—>Overhead 7

**BALUCHISTAN PRIMARY EDUCATION  
FEMALE/MALE ENROLLMENT RATIOS**

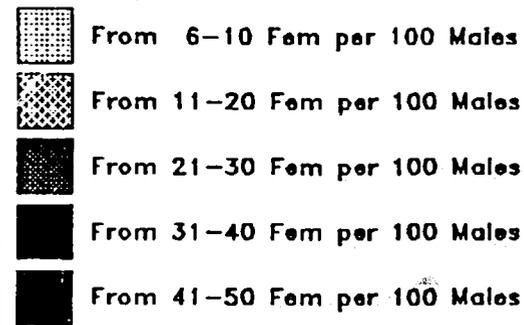
88

# BALUCHISTAN PRIMARY EDUCATION FEMALE/MALE ENROLLMENT RATIOS

Province Average = 24 Females per 100 Males



## FEM/MALE ENRL RATIO



Data Source: BEMIS, Oct 1990

10

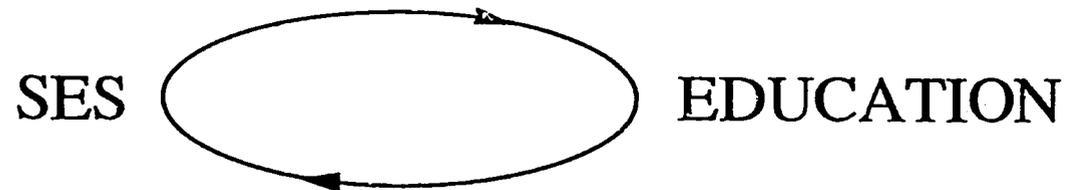
## A. EDUCATION AS AN END

### FOCUS:

THE INTERACTION OF ECONOMIC AND POLITICAL  
INEQUALITY AND EDUCATION

### RESEARCH SUGGESTS:

1. SES (Socio-Economic Status) determines access to education
2. Educational attainment determines SES



db

—>Overhead 9

## **B. EDUCATION AS A RESOURCE FOR DEVELOPMENT**

### FOCUS:

**EDUCATION AS AN INVESTMENT IN HUMAN CAPITAL  
WITH FAVORABLE RETURNS**

### RESEARCH SUGGESTS:

1. The individual/family justifies the expense of education in increased lifetime income
2. Society justifies the expense of education in increased:
  - A. Productivity
  - B. Social Benefits
3. Education is a means to support national identity and unity

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## SUMMARY OF RESEARCH FINDINGS

### RESEARCH SUGGESTS THAT:

1. Studies relating access in education to social equity indicate expanding education does not necessarily improve equity

(Education, if distributed unequally, can contribute to inequality.)

2. Studies that relate education to economic and social outcomes show some positive correlations

Educational attainment is linked to:

- A. Increased earnings
- B. Increased productivity
- C. Reduced fertility
- D. Improved family health

## SUMMARY OF RESEARCH FINDINGS (cont.)

### RESEARCH SUGGESTS THAT:

3. The complexities of variables and different environments need to be considered when choosing policy options
4. Differences in levels of development, culture and educational histories (colonialism) all affect the equity, economic productivity or national cohesion produced by a particular party

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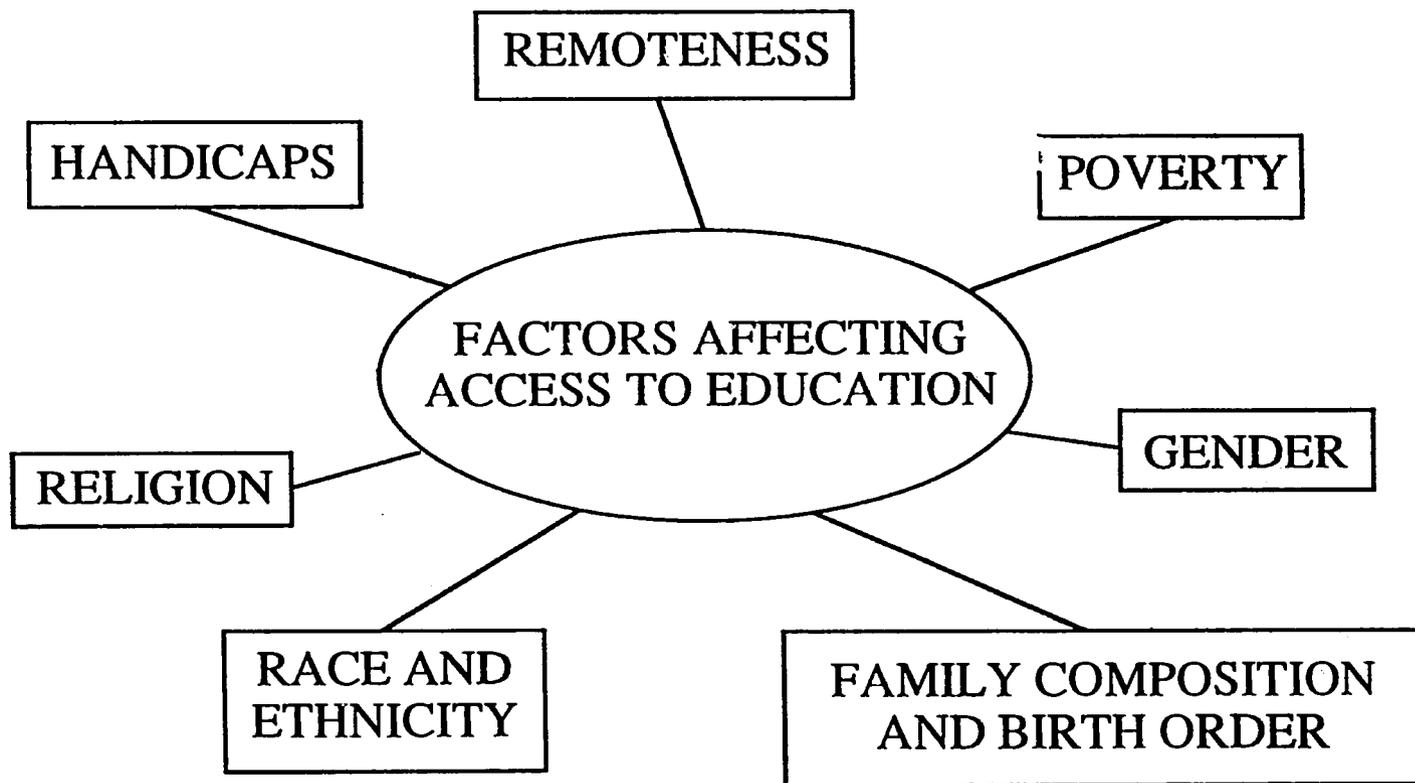
## ACCESS AND EQUITY STRIDES

### CHILDREN AGES 6 - 11 YEARS

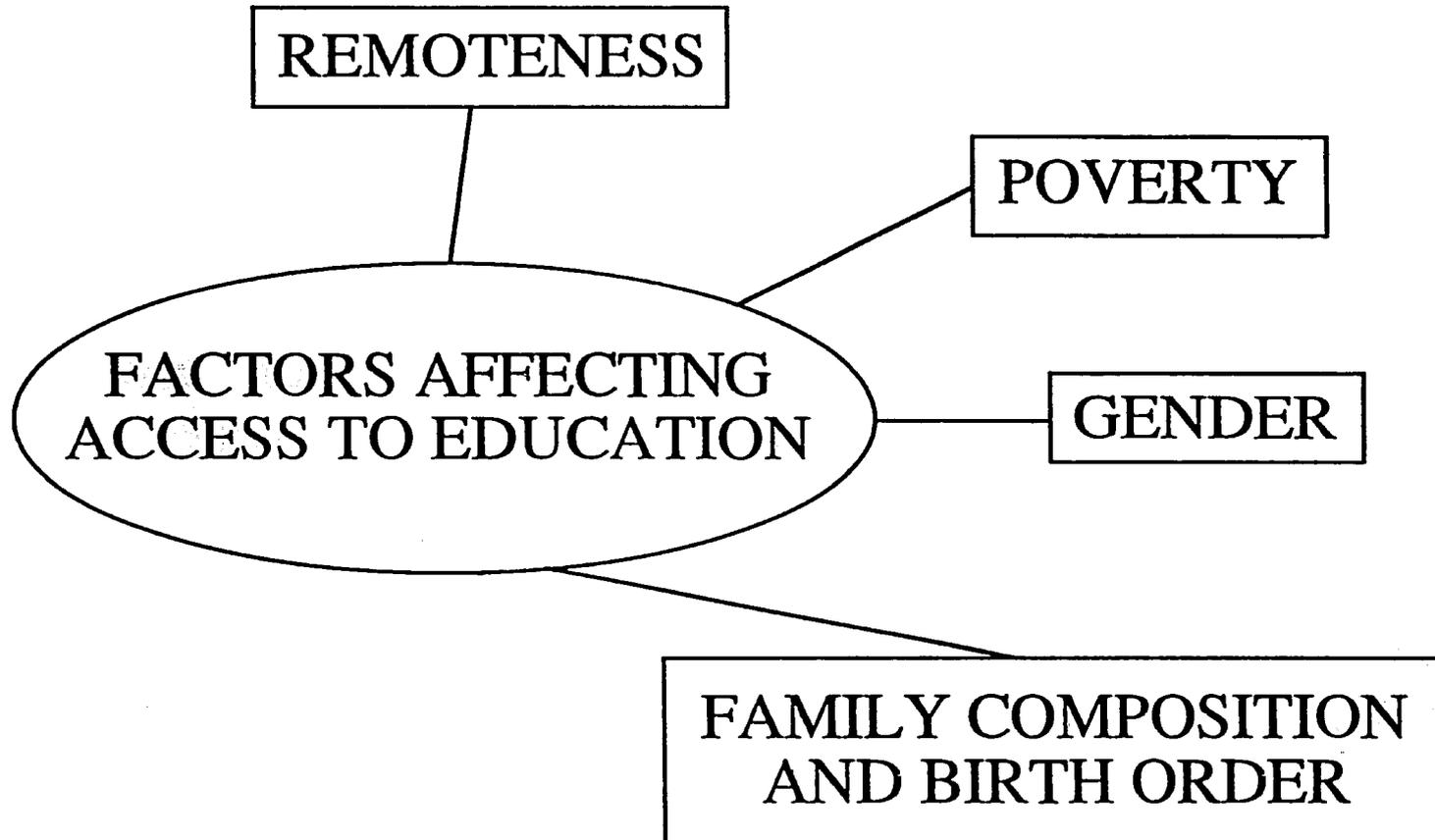
	<u>1960</u>	<u>1985</u>
AFRICA	32.7*	65*
ASIA	54.4	73.6
LATIN AMERICA	57.7	83.5

\* calculated in percentages

# ACCESS AND EQUITY: WHAT ARE THE ISSUES?

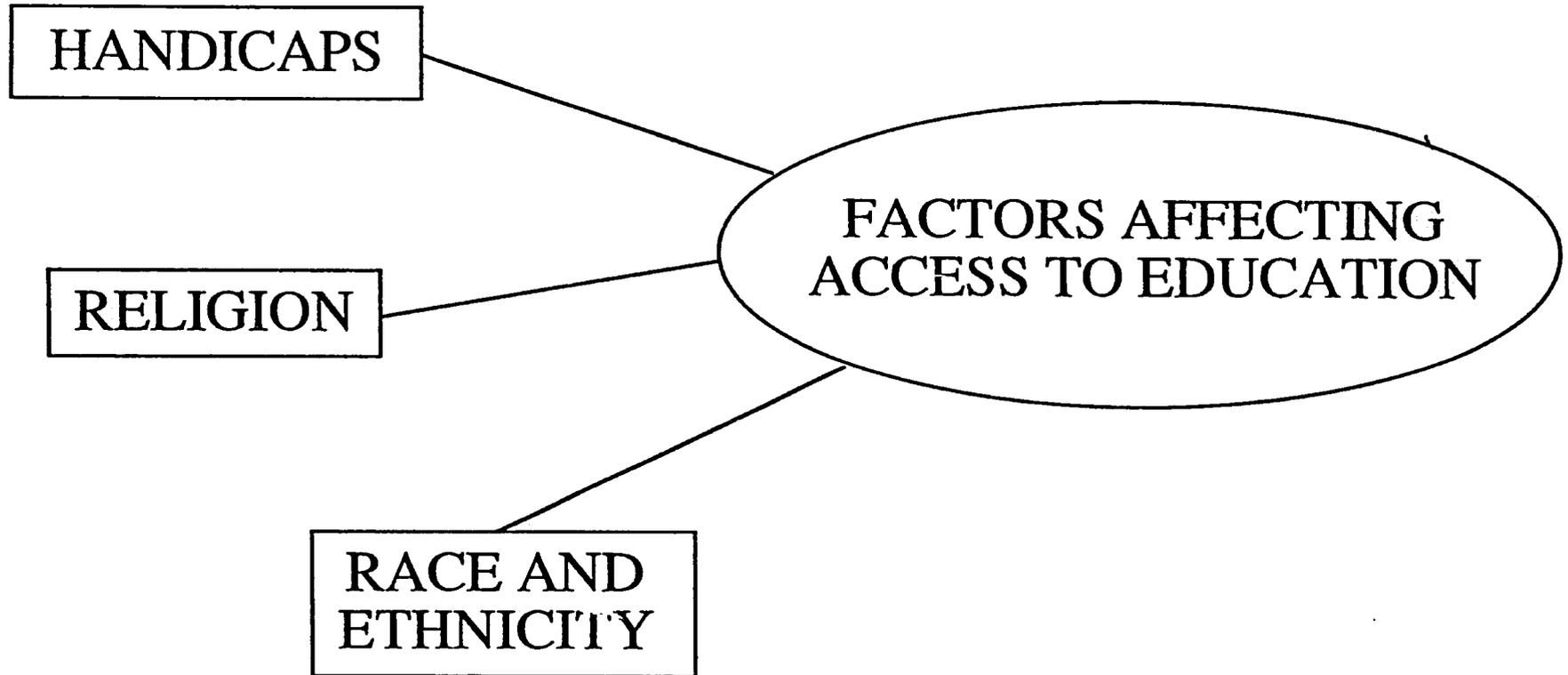


95



9b

—>Overhead 12C



10

## EXAMPLES OF POLICIES TO AFFECT SUPPLY OF EDUCATION

AIM	ACTION
1) Economic Growth	1) Target resources for farmers and females
2) Equity	2) Determine reason for a group's exclusion from school
	3) Tailor programs to address all the reasons for exclusion

## EXAMPLES OF POLICIES TO AFFECT DEMAND OF EDUCATION

AIM -----> ACTION

- 1) Make curriculum relevant
- 2) Increase participation of ethnic minorities and females
- 3) Enroll poor students

- 1) Alter curriculum for rural students
- 2) Recruit and place staff of ethnic minorities and females
- 3) Subsidize school fees of poor

10



—> *Overhead 16*

## **CASE STUDY OF KENYA: GROUP ACTIVITY B**

**Creating a Chart of Research-Based Policies:**

<b>Goals of Education System</b>	<b>Factors that Affect Access, Equity, Gender</b>	<b>Policy Options to Increase Access &amp; Equity</b>

—>Overhead 17

## CASE STUDY OF KENYA: GROUP ACTIVITY B

ACCESS FACTORS	RELATED POLICY	PROS	CONS	INFORMATION NEEDED	RECOMMENDATIONS

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## CASE STUDY OF KENYA: GROUP ACTIVITY B

<b>ACCESS FACTORS</b>	<b>RELATED POLICY</b>	<b>PROS</b>	<b>CONS</b>	<b>INFORMATION NEEDED</b>	<b>RECOMMENDATIONS</b>
<b>POVERTY</b>	<b>school feeding</b>	<b>poverty teach- ability</b>	<b>cost</b>	<b>cost benefits</b>	<b>collect data to study effects</b>

103

**Part I: Introduction**

- A. Why are we talking about access in education?
- B. Group Activity: Assessing Expectations and Resources
- C. What are the Issues?
- D. An Effort at Access and Equity: Pakistan

**Part II: Education Goals and Access Research**

- A. Expansion of Access to Education
- B. Focus of Research
- C. Summary of Research Findings
- D. Factors Influencing Access

**Part III: Kenya Case Study: Policy Options on Access to Schooling**

**Part IV: Understanding Access, Equity & Gender Issues: A Case Study**

- A. Group Activity A
- B. Group Activity B
- C. Summary of the Kenya Case Study

10/1

POLICIES IN ACCESS AND EQUITY IN EDUCATION

By E.D. Harris Stefanakis

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**CHART B**

**INCREASE SUPPLY**

OPTIONS WHERE DONE	HOW DONE	TARGET P G R M	PROS	CONS INEFFECTIVE CONDITIONS	EFFECTIVE CONDITIONS	INFORMATION NEEDED
1) <u>CONSTRUCTION</u> Six Countries	Build Plants Use local resources Map Location Fix plants	+ - + -	Brings school to remote Involves community Permanent impact	Very costly Takes time Needs labor, materials, staff, resources	With \$\$\$ When few schools When community asks Needs repairs	Cost Labor Other available materials
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105

**CHART B Continued**

**INCREASE DEMAND**

OPTIONS WHERE DONE	HOW DONE	TARGET P G R M	PROS	CONS INEFFECTIVE CONDITIONS	EFFECTIVE CONDITIONS	INFORMATION NEEDED
4) <u>REDUCE DIRECT COSTS</u> Eight countries	State pays fees, books Transportation Scholarships	+ + + +	Impacts all Tailor to countries Enrolls Incentives econ. dev.	Need secondary schools Long term Financial drain Selection?	As incentives To focus When trans. easily done When parents value ed.	Cost per pupil Transportation costs No. of students needing \$\$\$ Funding sources
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6) <u>MOBILIZE COMMUNITY SUPPORT</u> Four countries	Involve parents Conferences Open houses Media ads	- + - -	Can help parents value education Parents are resources Costs low	Hard to measure effect Time it takes parent Teacher cooperation	In small community When parents value ed. When all teachers want it Leadership	Community support Financial support Schedules Parents/school attitudes Leadership

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