

**A CRITICAL ANALYSIS OF THE *UNIVERSAL BASIC
EDUCATION POLICY (1999)* IN NIGERIA:
CONSEQUENCES OF THE EXTENT OF THE
IMPLEMENTATION OF FREE AND COMPULSORY
EDUCATION**

by

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DECLARATION

I, the undersigned, sincerely declare that this dissertation submitted in fulfilment of the degree:

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is original and entirely my own work, except where other sources have been acknowledged. I also certify that this thesis has not previously been submitted at this or any other faculty or institution.

I hereby cede copyright of this thesis in favour of the University of the Free State.

.....

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Bloemfontein

June 2014

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DEDICATION

I dedicate this study to my dear husband Chizindu A. Alikor and my children, Emmanuel, Victor and Joy.

CHAPTER 1: ORIENTATION

1.1 INTRODUCTION

As education has remained a social process in nation building and the maintenance of society for decades (World Bank, 1998: 11), it can be regarded as a weapon for the acquiring of skills, relevant knowledge and values for surviving in a changing world. Igbuzor (2006: 4), in stressing the importance of education, states that education is a human right that should be accorded to all human beings. Obani (1996: 5) also expresses that education improves the development of any society, leading to a strong nation. Education can therefore be seen as the best legacy a country can give to its citizens.

Based on the focal position education plays in achieving individual and societal development, the provision of basic education is of great importance in Nigeria. The importance of basic education is highlighted in the *National Policy on Education* (NPE) of 2004 and by the *Universal Basic Education Commission* (1999) as free and compulsory. According to United Nations Educational, Scientific and Cultural Organization (UNESCO) (2002: 25, also Arikewuyo & Onanuga, 2005: 1 and Adeyemi, 2007: 159-168), basic education can be conceptualised as all forms of organised education and training, including access to information to equip the individual to cope better with work and family responsibilities. The *Jomtien Declaration and Framework of Action on Education for All* (WCEFA, 1990) gives a similar definition of basic education, namely as a process which encourages close articulation of development of human and capital potentials. In other words, basic education is a life-long form of education involving learning to learn, mass literacy and adult education. As such, it is assumed that an adequate provision of basic education in Nigeria will serve to further develop human and capital resources in the country.

In order to pursue and bring about free, compulsory and universal basic education in Nigeria, the *Universal Basic Education* policy (hereafter UBE policy) was launched by the federal government in September 1999, but enacted as the *Compulsory, Free Universal Basic Education Act* in 2004. As a policy reform measure of the federal

government, the UBE is in line with Section 18 of the 1999 *Constitution of the Federal Republic of Nigeria*:

Government shall eradicate illiteracy; to this end, government shall as and when practicable provide a free and compulsory universal primary education, free secondary education and free adult literacy programmes.

With regard to free education, the UBE (2004: Part 1, Section 2(1)) states that “[e]very Government in Nigeria shall provide free, compulsory and universal basic education for every child of primary and junior secondary school age”. The issue of free and compulsory basic education is further underscored by the UBE’s vision statement (2004) whereby

[a]t the end of 9 years of continuous education, every child through the system should have acquired an appropriate level of literacy, numeracy, communication, manipulative and life skills and be employable, useful to himself and the society at large by possessing relevant ethical, moral and civic skills.

In view of the above, I can summarise that the UBE is aimed at enabling children in the Nigerian society to participate in 9 years of free schooling (primary to junior secondary school) with the overall purpose of ensuring the acquisition of the appropriate levels of literacy, manipulative and life skills as well as the ethical, moral and civic values needed for laying the foundation for life-long, human and capital development.

However, despite the adoption of the UBE, several researchers (Madugu, 2000: 68-77; Adebola, 2007: 53; Labo-Popoola, *et al.*, 2009: 252; Ejere, 2011: 221-226; and Duze, 2012: 38-44) have observed that many years after the policy was launched, it is still poorly implemented. They also identified various factors that may have contributed to the failure of the implementation of UBE. These factors include *inter alia* inadequate and poor data; inadequacy of policy resources; fragmentation and conflict of roles or responsibilities due to many agencies involved in the implementation; and a dearth of high quality personnel in the implementing agencies

at the state and local government level. Other factors affecting the implementation and performance of UBE in Nigeria are social, economic and political factors.

1.2 RATIONALE FOR AND VALUE OF THE RESEARCH

My interest in the extent of implementation of UBE relates to my experience as a teacher in Nigeria. During my three years of teaching at a junior secondary school, I discovered that there is a gap between the UBE and its goal of free and compulsory education for junior secondary school students. The school where I taught not only required the students to pay school fees, but once I had to pay a huge amount of money for a 13-year old girl to be admitted to the school. The mandatory payment required from all parents/guardians before a child is admitted to the school contravenes Section 3 of the UBE policy. According to Section 3 *“[t]he services provided in public primary and junior secondary schools shall be free of charge”*. On inquiry from the school administration, I discovered that schools are not adequately funded, hence creating the need to impose fees on students. This again is not in agreement with Section 11(1a) which states that *“[t]he implementation of the Universal Basic Education shall be financed from the Federal Government block grant of not less than 2% of its Consolidated Revenue Fund”*.

Having noticed problems with the implementation of free and compulsory education, I think it is important to research the consequences of the extent of the implementation of the UBE policy. The value of this study subsequently lies with the possibility of highlighting not only the problems related to the implementation or the extent of the implementation of the UBE, but also with the proposing of recommendations relevant for consideration by policy-makers and policy-implementers for a more informed actualisation of the aim and objectives of free and compulsory education.

1.3 RESEARCH QUESTIONS AND SECONDARY QUESTIONS

Based on my exposition of the problem associated with the extent of implementation of the UBE policy in Nigeria, my research question is: *What are the consequences of the extent of implementation of the UBE policy on free and compulsory education in Nigeria?* In order to adequately respond to this broad research question, the following secondary research questions arise:

- 1.3.1 How is free and compulsory education understood on the African continent?
- 1.3.2 What does the UBE policy entail with regard to free and compulsory education?
- 1.3.3 To what extent is the UBE policy implemented with regard to free and compulsory education?
- 1.3.4 What are the consequences of the extent of implementation of free and compulsory education?
- 1.3.5 What comments can be made regarding the implementation of free and compulsory education?

1.4 RESEARCH AIM AND OBJECTIVES

The overall aim of this study is to determine the consequences of the extent implementation of free and compulsory education as stipulated in the UBE policy of Nigeria. In order to achieve this aim, the following objectives will be explored:

- 1.4.1 to describe free and compulsory education as implemented on the African continent;
- 1.4.2 to analyse what the UBE policy entails with regard to free and compulsory education;
- 1.4.3 to determine the extent to which the UBE policy is implemented in a selection of Nigerian schools;
- 1.4.4 to explore the consequences of the extent of implementation of free and compulsory education; and
- 1.4.5 to make comments regarding the implementation of free and compulsory education.

1.5 RESEARCH DESIGN

In this section, an exposition will be given of the research paradigm, research methodology and research methods that are applicable to this particular study. Whilst a paradigm constitutes the theoretical lens through which a study will be undertaken (Mertens, 2010: 35), a research methodology refers to the general approach that will guide a study (Winberg, 1997). Silverman (in Willig, 2001: 8) highlights the difference between a methodology and research methods by indicating

that whilst the former refers to an approach, the latter refer to specific research techniques that will be used to undertake the study.

1.5.1 Research paradigm

According to Mertens (2010: 35-39) a paradigm is a way of looking at the world. In other words, it proposes a particular framework of thinking about the world and it influences the way in which a study will be approached. Trauth (in Rowlands, 2005: 83) sees this theoretical lens as vital for the research method the researcher plans to use. In order for me to be able to critically analyse the UBE free and compulsory education policy in Nigeria, this study will be conducted within the transformative research paradigm. The transformative paradigm came into existence during the 1980s and 1990s due to disappointment with existing research paradigms and their practices (Mertens, 2005: 17). In this regard transformative researchers argue that the interpretivist research paradigm does not sufficiently address issues pertaining to social justice and marginalised individuals (Creswell, 2003: 9). Rather, they are of the opinion that inquiry should be intertwined with politics and its agenda (Creswell, 2003: 9-10), and that an action for reform should be included in the agenda. Action for reform should subsequently bring about change in the lives of the participants in the research, as well as in the institutions in which the individuals work or live, and also in the life of the researcher.

Informed by a transformative paradigm, I will attempt to expose possible discriminatory practices in the implementation of the UBE policy. Such exposure is of importance if the implementation of the policy has to further human rights and social justice. Based on my understanding of the transformative paradigm, my study will be informed by an ethical stance towards inclusion and the challenging of oppressive social structures; by an assumed gap between policy on paper and the actual practice in terms of the UBE policy in Nigeria; and by the assumption that if the UBE policy is adequately implemented in Nigeria, it will be a strong weapon for the acquisition of the relevant skills, knowledge and values that will enable individuals to survive in a changing world.

1.5.2 Research methodology

Research methodology has been defined as “the collective set of attitudes, values, beliefs, procedures and techniques that create a framework of understanding through which theoretical explanations are formed” (Winberg, 1997: 14). Silverman (in Willig, 2001: 8) differentiates between methodology and method when suggesting that the former identifies a general research approach to studying research topics while the latter refers to a specific research technique. Whilst a transformative paradigm will be used as the lens through which the consequences of the extent of implementation of the UBE policy on free and compulsory education in Nigeria will be looked at, a multi-method approach will be used to explore such consequences.

According to Bryman (2001: 20) a multi-method approach entails the application of two or more sources of data or research methods to investigate a research question, or to investigate different but highly linked research questions. In this regard, Creswell (2003: 210; cf. also Tashakkori & Teddlie, 1998: 3) states that multi-method research involves “collecting and analysing both quantitative and qualitative data in a single study or a program of study”. The rationale for a multi-method approach is underpinned by the principle of triangulation and complementarity, where research is not over-reliant on a single research method (Bryman, 2001: 1). In this particular study, both quantitative and qualitative research methods will be used to investigate my research questions. Although the use of multi-methods can be complex and time-consuming (Thurmond, 2001: 253-258), I consider a mixed-method approach as most applicable in order to acquire and improve policy-relevant knowledge regarding the UBE policy. I consider a mixed-method approach most appropriate because the principle of triangulation will help to bring about convergence, corroboration and correspondence of results from different methods. Whilst triangulation can assist in increasing the validity of constructs, complementarity, which seeks to elaborate, enhance, illustrate and clarify the results from one method with the results from the other, can help to increase the interpretability and meaningfulness of constructs and results in this study (Greene, Caracelli & Graham, 1989: 258). Based on the foregoing, I am convinced that a multi-method research design framed within a transformative paradigm may be the best research approach to assist me in pursuing

my research objectives. In the next section an exposition will be given of the research methods I will use in my attempt to answer my research questions.

1.5.3 *Research methods*

Whilst a mixed-method approach will be adopted in this study, various research methods will be used as specific techniques to undertake this study as a systematic enquiry. As this study will be framed within a transformative paradigm, the latter, alongside with the research methodology will constitute the philosophical basis for decision making about the most appropriate methods for this particular study. According to Mertens (2009: 59), no one method is associated with the transformative paradigm. Rather, transformative research is characterised by the use of multiple approaches, methods, techniques, and theories that align with the assumptions by which the research is informed. As a consequence, various research methods will be used to realise the objectives of this particular study. A literature review will serve in achieving objective one (vide 1.4.1), while policy analysis will be used in pursuing the second objective (vide 1.4.2). The third and fourth objectives (vide 1.4.3 and 1.4.4) of this study relate to the empirical part of my research and will involve the carrying out of a survey and the conducting of interviews with relevant role players. My choice of research methods is further illustrated in Table 1 below:

Table 1: Summary of research objectives and the methods of data collection

Objective	Method
<ul style="list-style-type: none"> to describe free and compulsory education as implemented on the African continent.. 	<ul style="list-style-type: none"> Literature review
<ul style="list-style-type: none"> to analyse what the free and compulsory UBE policy entails. 	<ul style="list-style-type: none"> Policy analysis
<ul style="list-style-type: none"> to determine the extent to which the free and compulsory UBE policy is implemented in a selection of Nigerian schools. 	<ul style="list-style-type: none"> Survey
<ul style="list-style-type: none"> to explore the consequences of the extent of implementation of free and compulsory education. 	<ul style="list-style-type: none"> Interviews

1.5.3.1 Literature review

As indicated in Table 1, a literature review will be carried out to describe free and compulsory education from an African perspective. According to Naoum (2002: 17), a literature review includes, but is not limited to, readings of previously published and unpublished information relating to a particular subject matter or area of investigation. Furthermore, a literature review is “aimed at contributing towards a clear understanding of the nature and meaning of the problem that has been identified” (Fouché & Delport, 2005:123). Fouché and Delport (2005: 27) also associate a literature review with a detailed examination of both primary and secondary sources related to the research topic. With regard to primary sources, Naoum (2002: 19) notes that such sources are in most cases regarded as accurate because they involve original research. In order to obtain a good understanding of how free and compulsory education is internationally understood, the primary literature to be reviewed will include the *Education for All declaration* of 1990, as well as documents related to universal basic education in Malawi, Kenya and Uganda. It is my contention that a review of these sources will provide me with an African view of free and compulsory education, and that such a view and understanding will serve as a guide towards exploring the consequences of the extent of implementation of the UBE policy in Nigeria.

1.5.3.2 Critical policy analysis

In view of the perceived gap between the UBE policy on paper and the actual practice (cf. 1.2), a policy analysis will be undertaken in order to understand the issue of free and compulsory education from a policy perspective.

Hartshorne (1999: 5) gives a rather comprehensive definition of policy when indicating it as “a course of action adopted by government, through legislation, ordinances and regulations, and pursued through administration and control, finance and inspection with the assumption that it would be beneficial to the country and the citizens”. According to Colebatch (1998: 6-7), policy is multi-dimensional and provides at least three elements, namely authority, expertise, and order. With regard to the analysis of policy itself, various definitions are presented in the literature. Ulrich (2002: 1) regards policy analysis as a field of professional practice that is

concerned with the scientific analyses of the content and consequences of policies. Patton and Sawicki (1993: 6) on the other hand, are of the opinion that an analysis of policy “is the breaking up of a policy problem into different components, getting understanding about them and developing ideas on what to do”. In this particular study critical policy analysis as proposed by Taylor, Rizvi, Lingard and Henry (1997) will be used. Taylor *et al.*, (1997: 20) explain critical policy analysis (CPA) as a synthesising and interdisciplinary field of study which is relevant to the work of both the state and civil society. CPA can contribute towards an understanding of policies that are already in place, or it can assist in creating pressure towards a new policy agenda. Whilst CPA can subsequently be both reactive and proactive, it also has the potential to promote a better understanding of policy by explaining the connection between local practices and external contexts (Taylor *et al.*, 1997: 20). In sum it could be stated that CPA assigns meaning to the context in which a policy arises; it evaluates how policy-making processes are arranged; it assesses policy content in terms of a particular set of educational values; it investigates whose interest the policy serves; it explores how it might contribute to political advocacy; and it examines how a policy has been implemented and its subsequent outcomes (Taylor *et al.*, 1997: 20). Framed within the context of CPA, a context and content analysis of the *Universal Basic Education policy* (1999) and the *Rivers State Universal Basic Education Law* (2005) will be undertaken. It is my contention that a policy analysis of these policies will not only help me to understand the issue of free and compulsory education from a policy perspective, but also, the extent of implementation and along with the literature review, inform my empirical research.

1.5.3.3 Survey

Creswell (2008a: 46) describes quantitative research as a type of educational research in which the researcher decides what to study; asks specific, narrow questions; collects quantifiable data from the respondents; analyses these numbers using statistics; and conducts the enquiry in an unbiased, objective manner. Also, according to Bogdan and Biklen (1998: 4), quantitative research enables the researcher to be familiar with the concept he or she is to study, and possibly generate a hypothesis to be tested. In this study, a survey will be used to gather quantitative research data through questionnaires that will be distributed to and

answered anonymously by students, teachers, principals and parents. Questionnaires are considered useful for surveying large samples of respondents in a short time as they elicit a standardised set of responses from all respondents for easy comparison and quantification of results (Bless, Higson-Smith, & Kagee, 2006: 132; Nardi, 2003: 59). Whilst the analysis of the data collected through the questionnaires will enable me to gain a better understanding of the extent to which the UBE free and compulsory education policy has been implemented in selected schools in the Rivers State of Nigeria, the intention is not to generalise my findings (cf. Nieuwenhuis, 2007a: 65). My understanding of the extent to which the UBE policy has been implemented will therefore not be based on certainties. Rather, the use of a survey is informed by my intention to search for valid and reliable information regarding the implementation of the UBE policy so as to enable me to make recommendations for the effective implementation of free and compulsory education. A more comprehensive exposition of the quantitative methodology and how it will be used in this study will be provided in Chapter 4.

1.5.3.4 Interviews

Qualitative research is a type of research in which the researcher relies on the views of participants; asks broad, general questions; collects data consisting largely of words (or texts) from participants; describes and analyses these words in themes; and conducts the inquiry in a subjective, biased manner (Creswell, 2008a: 46). Framed within a qualitative approach, interviews will be conducted with different UBE stakeholders to gather multiple views on the possible consequences of the extent of implementation of the UBE free and compulsory education policy. According to Nieuwenhuis (2007a: 87), an interview is a two-way conversation during which the interviewer will ask the participant a question to gather data and to learn the behaviours, views and opinion of the participants. Whilst the interviews will serve as a following-up on the information gathered through the survey (cf. 1.5.4.3), semi-structured questions will be posed and directed to principals, teachers, parents, and UBE officers with the intention of getting adequate information regarding the consequences of the extent of implementation of the policy. In Chapter 5 a more elaborate exposition of the qualitative research to be undertaken in this study will be given.

1.5.3.5 Integrity of the study

Certain steps will be taken to ensure the integrity of the research and to ensure that it can be trusted and credible. Every person involved in the research will be engaged in an ethical fashion.

a. Reliability and validity

Reliability and validity are crucial to the value of any data-gathering procedure (Best & Kahn, 2003: 276). Reliability refers to the degree to which the instruments measure consistently (Best & Kahn, 2003: 277; Goddard & Melville, 2001: 41). Validity means that the instrument measures what it claims and intends to measure (Goddard & Melville, 2001: 41). The questionnaire used for this research project will be constructed to ensure ease of use and the reliability of the responses by the respondents will be considered. The questionnaires will be delivered by hand so that the respondents can respond in their own time, and the completed questionnaires will be collected at a later time. The participants will be informed that the questionnaires should be completed anonymously and that their responses will be kept confidential. The populations that will participate in completing the questionnaires are those who are actively involved in schools, so that they can give a true picture of the consequences of the extent of implementation of the UBE policy. For the purpose of enhancing reliability in this study, questionnaires will first be examined in detail with critical attention through the help of an experienced researcher in the Faculty of Education at the University of Free State before it will be administered to students and teachers for completion to avoid double-barrelled questions (Maree & Pietersen, 2007:160). The level to which the items are established in orderly connection with one another in the questionnaire will also be ascertained (Durrheim & Painter, 2006: 154).

b. Trustworthiness

Trustworthiness and credibility of the interviews will be enhanced through a member check (Cuba & Lincoln in Shenton, 2004: 68). By including the actual quotations of the participants it will show that the findings are based on real data (Shenton, 2004: 63). The data will be analysed by coding the transcribed data and identifying themes that will emerge from the data (Creswell, 2008a: 250-260).

c. Ethical considerations

Sikes (2004: 24) states that it is of great necessity that every researcher must consider the ethical implications of his/her research. He also established that the researcher must do everything possible to avoid harming anyone affected by the research (Sikes, 2004: 32). For the purpose of this research, the ethical clearance form will be collected from the University of Free State, permission to conduct the research will be sought, and consent will be obtained from the school principal, teachers and students before asking them to complete the questionnaires (Mouton, 2001: 244). Participants will be allowed to freely withdraw from the study at any time and the identity of the participants will be protected (Maree & Van der Westhuizen, 2007: 41-42) by making sure that the names of the schools and respondents will not be recorded and by destroying tapes and transcripts of the interviews immediately after the study has been completed. Finally, participants will be allowed to converse in their language of choice (e.g. English or Ikwerre) but will be translated in English to prevent identification of participants or schools.

1.6 DEMARCATION OF THE STUDY

1.6.1 Scientific demarcation

As indicated previously, Hartshorne (1999: 5) defines education policy as a course of action which is adopted by government through legislation, ordinances and regulations, and then pursued through administration and control, finance and inspection. The study of education policy is often focused on either the policy process or the intelligence needs of policy (Berkhout & Wielemans, 1999: 405). As a consequence education policy studies entail the policy-making process, as well as the analysis of policy. With regard to policy analysis, Codd (1998: 235) suggests that its focus is either on the informational base on which a policy is constructed (*analysis for policy*), or a critical examination of existing policy (*analysis of policy*). Following Codd's explanation, my study will focus on the analysis of two existing policies, namely the *Universal Basic Education Policy* (1999) and the *Rivers State Universal Basic Education Law* (2005). By means of an *analysis of policy*, a context analysis will be undertaken to gain insight into the historical antecedents that lead to the placing of free and compulsory education on the policy agenda. The content analysis will focus on the *what and how* of the policies. As my study is aimed at determining

the consequences of the extent of implementation of the UBE policy, and whilst the study will involve policy analysis and recommendations to policy-makers for the effective implementation of policy, it can be stated without a doubt that this particular study can be demarcated within *education policy studies*.

1.6.2 Geographical demarcation

The Federal Republic of Nigeria lies along the west coast of Africa north of the equator between latitude 5 and 18 degrees and longitude 0 and 20 degrees. As a former British colony, Nigeria gained independence in 1960 (Ikoya, 2006: 10). Abuja is the capital of Nigeria and the country has a population of about 160,000,000. This study will be carried out in the Rivers State, one of the 36 states of Nigeria (cf. figure 1). Port Harcourt is the capital of the Rivers State and the latter is home to diverse ethnic groups including the Ikwerre, Ijaw, and Ogoni. The Rivers State is made up of 23 local governments (cf. figure 2), and according to the census figure of 2006 its population is estimated to be 5,185,400 (National Population Commission of Nigeria, 2006). This study will be conducted in two of the local governments, namely the Obio/Akpor Local Government Area (LGA) and the Ikwerre LGA. Two schools from each of these LGAs will be included in this research. The questionnaires will be completed by the principals and vice-principals of the four selected schools, ten teachers from each of the schools, and twenty students and twenty parents from each of the schools. Also, UBE stakeholders such as parents, teachers and UBE board officials from the four selected schools will be interviewed.



Figure 1: Map of Nigeria showing the 36 states of Nigeria and the federal capital city (courtesy of nigeriamap.pdf)



Figure 2: Map of the Rivers State showing the 23 local government areas (www.ncocusa.com)

1.7 RESEARCH OUTLINE

In order to reach the aim of this study, which is to determine the consequences of the extent of implementation of free and compulsory education as stipulated in the UBE policy of Nigeria, this dissertation will be presented in the following chapters:

- In Chapter 2 a literature review will be undertaken to explore free and compulsory education as a phenomenon within the African context. It is my contention that such a literature review will help me to gain a better understanding of how free and compulsory education is perceived within the African context.
- In Chapter 3 and by means of a policy analysis of the UBE policy of Nigeria and that of the Rivers State, an exposition will be given of with these policies entail with regard to free and compulsory education. Such an analysis ought to

contribute towards a better understanding of what is expected in terms of the implementation of free and compulsory education in Nigeria.

- In Chapter 4, a survey will be undertaken in order to determine the extent to which the UBE policy has been implemented in a selection of Nigerian schools. The compilation of the questionnaires that will be distributed to students, principals, teachers and parents will be based on the insights gained from the literature review and the policy analysis.
- In Chapter 5 the focus will be placed on the conduction of interviews with teachers, parents and UBE officials. Whilst the use of a survey in Chapter 4 will be primarily aimed at determining the extent of implementation, interviews will be conducted to explore the consequences of the extent of implementation of the UBE policy.
- In Chapter 6 the research findings will be used to draw final conclusions in my attempt to answer my research question. Based on the conclusions, recommendations will be made with regard to a more effective implementation of free and compulsory education as stipulated in the UBE policy.

1.8 SUMMARY

In this chapter an exposition was given of the proposed research. Framed within a transformative paradigm and informed by a mixed-method approach, this study is aimed at determining the consequences of the extent of implementation of free and compulsory education as stipulated in the UBE policy of Nigeria. In order to reach this research aim, various research methods will be used, namely a literature review, policy analysis, and data collection by means of questionnaires and the interviews. The research objectives were also outlined in this chapter, along with an explanation of issues regarding the integrity of the study and how this study is demarcated, both scientifically and geographically.

In order to achieve my first research objective, the next chapter will focus on a literature review to inform my understanding of free and compulsory education from an African perspective.

CHAPTER 2: FREE AND COMPULSORY EDUCATION ON THE AFRICAN CONTINENT

2.1 INTRODUCTION

In the previous chapter it was indicated that there seems to exist a gap between the UBE policy and its actual implementation in Nigeria (cf. 1.2). Many years after the policy has been adopted by the federal government of Nigeria, there still seems to be a poor implementation thereof in schools. However, in order to be able to comment on the consequences of the extent of implementation of the UBE policy in Nigeria, I first need to explore free and compulsory education in general. By means of a literature review, insight will be gained on how free and compulsory education is perceived in *inter alia* Malawi, Uganda and Kenya. The exposition of free and compulsory education in these countries will be framed within the context of the *Jomtien World Conference on Education for All* (EFA) which was held in Thailand in 1990. The importance of reviewing the Jomtien Declaration lies with the fact that Malawi, Uganda and Kenya are part of the one hundred and fifty five nations which pledged to ensure the quality of basic education for children, youths and adults. In order to achieve education for all, it is expected that these countries will not only make basic education free and compulsory for their citizens, but will remain committed to it by providing all human and material resources needed to deliver quality and equitable basic education to children, youths and adults (EFA Forum, 1994: 42). This is also in tandem with the Millennium Development Goals (MDG) 2 and 3 which focus on ensuring that all children have access to and complete a full course of primary schooling, and to also eliminate gender disparity in education by 2015 (United Nations Millennium Development Goals, 2000).

My decision to work with Malawi was primarily informed by the fact that whilst Malawi was one of the first developing countries to respond to the Jomtien call for EFA (UNESCO, 1994), it is expected that this country has, one decade after the adoption, a well-developed free and compulsory basic education system. Kenya, on the contrary, only adopted free and compulsory education more than a decade after signing the Education for All declaration (UNESCO, 2004) and has had less time to

develop a free and compulsory basic education system. Uganda, however, adopted free and compulsory education in 1997 which is midway between Malawi's and Kenya's adoption thereof. It is my contention that a review of the Education for All declaration and the perceptions of free and compulsory education in Malawi, Uganda and Kenya will not only inform my understanding thereof, but will also serve as a background to consider free and compulsory basic education in Nigeria.

2.2 JOMTIEN DECLARATION ON EDUCATION FOR ALL OF 1990

In the 1980s, the nations of the world spoke through the Universal Declaration of Human Rights, that "everyone has a right to education" (World Conference on Education for All and Framework for Action to meet basic learning needs (WCEFA), 1990: Article I (1)). However, despite this declaration and some efforts by countries in the world to ensure the right to education for all, more than 100 million children did not have access to primary schooling while others dropped out of school especially in the low-income nations of the world (WCEFA, 1990). Because of the poor state of basic education around the world in the 1980s, a world conference on Education For All was held in March 1990 in Jomtien, Thailand. This conference involved government representatives, international agencies, professional partners, non-governmental groups and prominent persons in the field of education from around the world (EFA Forum, 1994: 42). Whilst the conference officially recognised the failure of past international intentions and actions towards universal literacy and schooling (Bousquet, 1990: 83), Torres (1999: 1) describes the conference as an attempt to ensure basic education and to redefine its vision and scope. In a more comprehensive manner, UNESCO (EFA Forum, 1994: 42) summarised the Jomtien Declaration as

a real turning point in population trends, in human resource development, in economic growth, in rural and international migration patterns, in the formation of a new global vision if its targets are effectively attained. And this calls for new priorities in the agendas of nations, intergovernmental organisations and multi-national enterprises. It presupposes a new blueprint for our common future. It demands a renewed faith in the UN system and a new commitment to disarmament. It implies sharing and

reducing the intolerable gaps and asymmetries of today's world. It requires endogenous capacity-building. It means understanding that poverty, ignorance and marginalisation are the roots of violence, extremism and conflict. It means a new dream - the dream UNESCO was created for: moral and intellectual solidarity throughout the world (EFA Forum, 1994: 42).

2.2.1 Purpose of EFA

The Jomtien Declaration on EFA emanated as a result of the poor situation of basic education around the world in the early 1990s and serves as a framework for the design and implementation of education policies that ensure quality basic education for children, youths and adults. This framework is underpinned by four elements which constitute the well-defined purpose of EFA to meet basic learning needs.

The focus of basic education as defined in the first element clearly states that every person “shall be able to benefit from educational opportunities designed to meet their basic learning needs” (WCEFA, 1990: Article I (1)). In accordance with Article I (1) of the document, basic learning needs include the essential learning tools and basic learning content required by human beings to “survive, to develop their full capacities, to live and work in dignity, to participate fully in development, to improve the quality of their lives, to make informed decisions, and to continue learning”. In this regard, it seems as if EFA is committed to the enhancement of the overall economic, social, and cultural environment that impacts on learning, which means guaranteeing learners the basic objective conditions for learning. Whilst it is acknowledged that the basic learning needs of youths and adults differ, it is proposed that such differing needs can be met through different systems. This first element subsequently implies that in order to implement EFA, adequate steps will have to be taken by the signatories to ensure that the basic learning needs of every child, young person and adult are met by school and out-of-school education under the umbrella of basic education. However, since poverty, among other factors, has played a prominent role in denying young people quality and accessible basic education, particularly in developing nations, the introduction of free and compulsory basic education is central to actualising EFA.

The second element of EFA underscores the emphasis on the ensuring of “commonly accepted humanistic values and human rights”, including the enhancement of “international peace and solidarity in an interdependent world” (WCEFA, 1990: Article I (2)). Thus, in addition to sound basic education which should help to strengthen high levels of education and contribute to self-reliant development, all available instruments and channels of information, communication, and social action should be used to educate people on social issues.

The third element (WCEFA, 1990: Article I (3)) acknowledges that whilst countries differ from one another, the “transmission and enrichment of common cultural and moral values” should be regarded as one of the fundamental aims of educational developments. The latter is of importance as the individual and society find their identity and worth in such values. Basic education is therefore not just an end, but it is also understood as a new vision of education that also serves as the platform for human development and nation building. This, once again, foregrounds the importance of free and compulsory basic education as a prerequisite for the transmission of the norms and values essential for human development and nation building.

The importance of free and compulsory education is further emphasised by the fourth element, through which basic education is regarded as “the foundation for life-long learning and human development on which countries may build, systematically, further levels and types of education and training” (WCEFA, 1990: Article I (4)).

In sum it could be stated that the Jomtien Declaration on EFA not only proposes a vision for basic education, but it also envisages educational and learning environments that include the involvement of *inter alia*, communities, families and mass media in achieving basic education. The commitment made at Jomtien was not only interpreted as a worldwide commitment to “universal access to, and completion of primary education by the year 2000” (Colclough & Lewin, 1993: 11), but should also be interpreted as a genuine attempt to achieve quality basic education for all.

2.2.2 Goals of the Jomtien Declaration on EFA

In tandem with the overall purpose of the conference aimed at meeting basic learning needs (cf. 2.2.1), six goals were set and strategies were adopted to fasten commitment to action (WCEFA, 1990). The first goal relates to the expansion and development of early childhood care, especially for the less privileged and disabled children. The support of early childhood care and development by the Jomtien Declaration and Framework serves two main targets, namely to create awareness and understanding of the importance of the early years for future development and learning, and secondly to introduce and extend programmes that will support the development of the girl child (Myers, 2000: 4). However, the reference to less privileged and disabled children has a bearing on the social justice purpose of EFA as exposed in Article I (2) of the declaration. The first goal of EFA subsequently reflects a commitment to position early childhood education and care as a necessary foundation for continuing personal, cultural, social and economic development.

The second goal of EFA is to provide “access to basic education universally and completion of primary education by the year 2015” (WCEFA, 1990; also Colclough & Lewin, 1993: 11; UNESCO, 1993: 3). This goal should be read along with the third goal which is aimed at increasing the learning achievement of 80% of children under the age of 14, and is also connected to the fourth goal which is aimed at the reduction of “the rate of adult illiteracy by the year 2015 with emphasis on female literacy” (WCEFA, 1990; UNESCO, 1993: 3). The latter is specifically aimed at reducing the difference between the male and female rate of illiteracy. The commitment of EFA to eradicate the rate of illiteracy relates to the perception during the 1990s when illiteracy was seen as a product of cultural, social-economic and educational factors (Wagner, 2000: 477). Whilst these goals are aimed at increasing access to basic education and the decreasing of levels of illiteracy, countries were, by implication, compelled to embark on literacy training programmes, both public and private, and with the full engagement of the community, supported by strong and well-resourced policies (Mathew, 1999: 1).

The fifth goal is aimed at the provision of basic education skills needed by adults and youths, assessed by behavioural changes and impacts on health, employment and productivity (WCEFA, 1990; UNESCO, 1993:3). With regard to this goal, it could be

noted that several international organisations like the European Union, the Organisation for Economic Co-operation and Development (OECD), the International Labour Organisation, UNESCO and the World Bank have all taken certain steps in assisting countries to define competencies and skills, to determine learning experience, and to strengthen and analyse links between education training providers and the labour market (OECD, 1999; Skilbeck, 2000: 59). As a result, programs were introduced by many countries in their school curriculum and vocational training curriculum to improve the transition from education to life of work.

The sixth goal of the Jomtien Declaration resonates very strongly with the notion of the improvement of people's standard of living. In this regard the focus is placed on the necessity of enabling individuals and families to "acquire skills, knowledge and values needed to better their standard of living and sustain the development made available through all the channels of education including the mass media, traditional communication and social action" (WCEFA, 1990: 3). The Jomtien Declaration not only constitutes a world-wide programme designed to achieve a better life for people, but the realisation of this vision requires the signatories to formulate ideas for the future and to continuously make commentaries on their achievement in terms of better living. EFA is subsequently not just a moral obligation and a right, but it is also an investment which requires a willingness from countries to adopt policies, plans and development strategies to better their education systems.

In order for the purpose and vision of the Jomtien Declaration to be realised, and subsequently for the above-mentioned goals to be achieved, certain implications for the establishment of free and compulsory education are implied for the signatories.

2.2.3 *Implications of the Jomtien Declaration on EFA*

The Jomtien Declaration for free and compulsory education can be interpreted as a genuine attempt and commitment to achieving quality basic education for all by the year 2015. It can also be interpreted as a commitment to providing the people with elementary knowledge and understanding to face challenges that are linked to their survival (EFA Forum, 1996c).

As a holistic view of free basic education and in order to serve as a platform to evaluate the situation of free basic education in the signatory countries, the Jomtien Declaration requires that attempts be made to introduce and attentively monitor free basic education programme in the respective countries, bearing in mind an internationally binding obligation to regular evaluations (UNESCO EFA Forum, 1994: 42). In addition, the actualisation of EFA requires a supportive policy context framed within the social, economic and cultural sectors of the various countries, including the mobilisation of private and voluntary financial resources (cf. WCEFA, 1990: Article I). In the same Article it is implied for signatories to recognise that time, energy and funding for basic education is the most important investment which can be made for the people and the future of a country. It is subsequently important for the signatories to work together in order to promote equitable and fair economic relations so as to redress existing economic inequalities between nations, and to resolve conflict and create a stable and peaceful environment.

Once states ratify international human rights instruments, they commit themselves, through whichever government is in power, to compliance with the rights embodied in those instruments. States subsequently hold the primary responsibility and are accountable to the holders of those rights for their implementation (UNESCO, 2007: 39). In reference to this, the 155 countries who signed the Jomtien Declaration on EFA are bound to the following:

- to fulfil the right to education by ensuring that education is available to all children and that positive measures are taken to enable children to benefit from it;
- to respect the right to education by avoiding any action that would serve to prevent children from accessing education, such as legislation that categorises groups of children with disabilities as uneducable; and
- to protect the right to education by taking the necessary measures to remove the barriers to education posed by individuals or communities, such as cultural barriers or violence and abuse in the school environment.

However, in order to consider the implications of EFA for the signatories, I will refer to the six goals (cf. 2.2) and their concomitant implications.

2.2.3.1 Expansion of Early Childhood and development activities

The aim of early childhood development programmes is to develop the health and physical growth of the child, its mental capabilities, to inculcate moral values and good social habits, and to help the child to appreciate his/her cultural background (WCEFA, 1990; UNESCO, 1993: 3). In addition, such programmes are also aimed at helping with the development of the child's language and communication skills in the mother tongue (UNESCO, 2003: 30). In order to actualise this goal, the signatory nations are subsequently obliged to develop and implement educational policies that would safeguard the rights and welfare of children from early childhood to adolescence. It is also the responsibility of these governments, through their policies, to monitor and increase budgetary allocation or set aside funds for the expansion of early child education. In this regard it can be expected from governments to provide conducive learning environments which will encourage and increase the participation of children and contribute to their development (cf. Wanjohi, 2011: 14). Additionally, it is also expected that the 155 countries that signed the Jomtien Declaration should pay good attention to the training of teachers for ECCD. By implication and in order to ensure the effective transitions at each stage of the child's life, these signatories are expected to continuously review their policies and strategies.

2.2.3.2 Universal access to and completion of primary education

This goal is aimed at ensuring that every child enters primary school at the right age of 6+ years and to ensure that at age 13, the child has completed primary education (WCEFA, 1990; UNESCO, 1993: 3). For this goal to be actualised, governments are expected to draw up an educational policy which will give every child of school age access to basic education. In achieving this, the signatory nations must also put in place measures to ensure that all children of school going age benefit from the policy. Furthermore, one could expect that these governments should constantly review their policies to determine their strengths and weaknesses, but also the failures and achievements of their programmes. By means of a periodic review, I contend that its outcome will largely respond to the changing needs of society. Furthermore, governments should map out strategies to know how many students are of school age, redesign the school curriculum, and initiate programmes for the

training and re-training of teachers (Skilbeck, 2000: 31). They should also develop a programme that should incorporate the holistic development of the child, embracing life skills, health and physical power, language and communication skills (Skilbeck, 2000: 31.). To attain this goal, all the signatories are obliged to ensure that every child between 6 and 13 years has access to and completes primary education by 2015. The argument is that the opening of access to schooling for all can only be achieved by making education free and compulsory to all who are of school age, but also through constant monitoring and evaluation of policy.

2.2.3.3 Improvement in learning achievements

The third goal is aimed at ensuring that the child's learning achievement is improved from time to time. As a consequence, governments have to introduce and implement an educational policy that advocates and increases learners' achievement. The signatories are subsequently obliged to provide a system of comprehensive evaluation in primary schools, with cumulative record cards of pupils showing their performance (Skilbeck, 2000: 54). A continuous assessment system should therefore be put in place to ensure the monitoring of learning achievements. Teachers should subsequently be trained to carry out both formative and summative evaluations of students through tests and assignments, and practical, oral and written examinations (Ward *et al.*, 2006: 76). Governments are also expected to design, develop and produce appropriate and relevant curricula for primary education, to produce and provide instructional material, to increase the percentage of primary school teachers with the required academic and professional qualifications, and to regularly inspect and supervise their schools (UNESCO, 2010). Regular inspection of schools has the potential to contribute to the actualisation of the goal since the monitoring group can evaluate the primary curriculum. Monitoring can also ensure the provisioning of materials and organise orientations for teachers on curriculum and curricular materials.

2.2.3.4 Reduction of the adult illiteracy rate

This goal aims to reduce the adult illiteracy rate through continuous learning while at work and at home. It involves the acquisition of basic adult literacy and numeracy, health education programmes, gender awareness, women empowerment, the

improvement of agricultural skills, civil education, and income generating management skills in order to address poverty (Mathew, 1999: 1). For the goal to be achieved, the signatories must develop educational policies that encourage adult education, functional literacy and numeracy, functional skills relevant to life, and which aids in the development of a national awareness by individuals (Skilbeck, 2000: 45). By implication, a literacy curriculum and instructional materials must be developed, and literacy educators trained.

2.2.3.5 Expansion of basic education and training

Programmes must be designed to assist individuals to develop a variety of basic practical skills that will enable them to make a living in a multi-skilled world, and to bring about a spirit of self-reliance (WCEFA, 1990; UNESCO, 1993: 3). As such, the signatories must draw up educational policies that emphasise training in other essential skills, they must make budgetary provision for policy implementation, they have to equip all individuals with scientific knowledge, skills and values for the responsible utilisation of the environment, they need to set up a strategy for the development of a primary curriculum and instructional materials that emphasise basic learning needs, teachers must be trained on essential skills, and curricula activities must be promoted, monitored and evaluated (Skilbeck, 2000: 59). I agree with Foley (2010: 1) that if learning skills for primary education incorporate skills of communication, oral expression and reading and writing in local languages, then the actualisation of EFA goals can be enhanced and facilitated (Foley, 2010: 1).

2.2.3.6 Increased acquisition of knowledge, skills and values

The aim of this goal is to provide opportunities for continuous and developmental life-long education for youths and adults, including dropouts, and to adequately cater for the educational needs of the society (WCEFA, 1990: 3). In order to achieve the latter, the signatory nations must develop policies to encourage and support the development of continuing or further education. As a consequence, governments need to support tertiary institutions, especially universities, to expand their activities to continuing education and extension work. Governments should address needs of continuing education by making budgetary provision, and rehabilitate and transform community centres into cultural development centres and youth and adult education

centres (Skilbeck, 2000: 63). Furthermore, it can be assumed that consideration should be given to the improvement and strengthening of public libraries and the development of radio and TV channels for educational programmes, the promotion of rural press and the training of staff for educational programmes, and the monitoring of implementation strategies (Skilbeck, 2000: 64-65).

From the foregoing exposition it is clear that being a signatory to the Jomtien Declaration of Education for All implies certain responsibilities and obligations, all of which are aimed at ensuring free and compulsory education at primary school level. In the next section of this chapter, an exposition is given of the state of free and compulsory education in three countries that signed the Jomtien Declaration. By means of a literature review I will comment on the outcome of the introduction and the subsequent implementation of free and compulsory primary education in Malawi, Kenya and Uganda. In addition to comments on issues such as *inter alia* pupil enrolment rate, structural development, curriculum development, teachers' training and the retraining and provision of instructional materials, problems regarding adequate implementation will also be highlighted.

2.3 FREE AND COMPULSORY PRIMARY EDUCATION IN MALAWI

Malawi was the first country in East Africa and among the first group of African countries to launch and implement free primary education. Free Primary Education (FPE) was launched for all grades in Malawi in September 1994 (Avenstrup, Liang & Nelleman, 2004: 1). In response to the Jomtien Declaration, Malawi pledged to ensure quality basic education for children, youths and adults. As a consequence, Malawi undertook to give new life to education reform (cf. EFA Forum, 1994: 42) with the aim of providing the Malawian people with elementary knowledge and understanding to face the challenges linked to their survival (EFA Forum, 1996c). In achieving this, the FPE scheme in Malawi was introduced to maintain the social contract and establish quality education (Chimombo, 2005: 155-172; World Bank, 2010: 182).

2.3.1 Consequences of FPE

One of the first consequences of the Malawian Ministry of Education's adoption of EFA was an increase in the rate of pupil enrolment. Enrolment increased by about 44.1% for the academic years between 1993/94 and 1994/1995 (Ministry of Education Science and Technology (MoEST), 2011). Pupil enrolment kept on increasing until 2002/2003 when it dropped as a result of droughts and subsequent famine in the country. However, MoEST (2011) reports that about a year later the pupil enrolment numbers began to rise again, and in 2010 and 2011 enrolments reached about 3.869 million and 4.034 million pupils respectively. Furthermore, the *Malawi Country Status Report* of the World Bank (2010:182) indicated that while the gross enrolment rate for standards 1 to 8 was 119.8% in 2000, the rate was twice as high for standards 1 to 4 at 158.6% when compared to standard 5 to 8 at 101.2%. This phenomenal increase in pupil enrolment is regarded as a result of access to free education of the otherwise poor and less privileged children who would not have gone to school, as their parents or guardians could not afford to pay school fees. However, the increase of enrolment did not come without challenges such as overcrowded classes, and a shortage of teachers, textbooks and materials (Malawi Growth and Development Strategy (MGDS), 2006: 50; also Chimombo, 2005: 16; Kadzamira & Chibwana, 2000: 28).

Another outcome of the adoption of FPE in Malawi was the implementation of the crash classroom construction programme and in-service teacher paraprofessional training in small schools (Chimombo, 2005: 168). The increase in pupil enrolment after the adoption of FPE placed a burden on the available classrooms, necessitating urgent construction of classrooms to meet the increasing pupil enrolment. Additionally, there was also an urgent need to do some in-service paraprofessional training in order to enhance the qualities of this group of teachers. There was also recruitment of professional teachers who had to have adequate basic training to meet the goals of the programme (World Bank, 2010: 182). It is assumed that whilst these programmes and in-service training were aimed at meeting the challenges brought about by the rising enrolment rate, the Ministry of Education was also taking up the challenge to deliver quality basic education, particularly to the poorer Malawian population in the most remote areas of the country.

The launching of FPE also brought about various aspects related to education that have an influence on the adequate implementation of FPE. These aspects include curriculum assessment, language of instruction, the learning environment, procurement and the distribution of teaching materials, and the teacher education system.

2.3.1.1 Curriculum assessment

Along with cooperation and consultation meetings with parents and pupils, curriculum assessment reform in Malawian primary schools started in 2001 (UNESCO, 2010). A national curriculum and assessment framework was proposed in February 2003, following the development of an outcomes-base model which was eventually approved in 2007. The process of this curriculum reform was done in stages for two standards at a time, and teachers were given orientation training in the revised outcomes-based curriculum which included student-centred learning and continuous assessment (UNESCO, 2010). The implementation FPE and the subsequent development of a new curriculum seem to be aimed at enhancing and facilitating the achievement of increased access to quality basic education as proposed by EFA. Furthermore, the implementation of this outcomes-based curriculum is aimed in particular at delivering the knowledge, skills, values and attitudes to meet the basic learning needs of Malawians (WCEFA, 1990; UNESCO, 1993: 3). Also, as pupils are no longer required to pay school fees for basic education, it can be assumed that Malawians in general will be enabled to live and work with dignity as fully empowered human beings.

2.3.1.2 Languages of instruction

Initially, the language of instruction as stipulated in the *National School Textbook Policy* (2006) was Chichewa for Standards 1 to 4 and the materials had to be written in Chichewa. In addition, English would be used as the language for instruction in Standards 5 to 8, with study material in English (MoEST, 2006). The underlining reason for this policy possibly resonates with the fact that a large percentage of Malawians speak Chichewa. Using the home language Chichewa as the medium of instruction in the lower grades will make for an effective and productive learning

since mother tongue language is considered best for lower grade learning (Foley, 2010: 1).

However, following the curriculum assessment reform of 2007, there was a change in the policy on the language of instruction for lower grade students. In order to include other minority languages and thereby compensate for language differences across the regions, the new policy instructed that both Chichewa and English be taught from Standard 1 as a subject, while a common local language should be used as the medium of instruction for Standards 1 and 2 (MoEST, 2009). It is further stated that English will be gradually introduced as the medium of instruction in Standard 3, with the common local language still used as a support language in Standards 3 and 4. The curriculum concludes with English as the sole medium of instruction from Standard 5 onwards (MoEST, 2009). It can be assumed that consideration of the language of instruction is aimed to facilitate and enhance proper learning. If students are taught in a local common language which they understand, their learning will by implication be more effective and productive. This argument has been supported by research according to which teaching and learning in the mother tongue language yields better results (Foley, 2010: 1). It could therefore be assumed that the inclusion of minority languages has the potential to fast-track the learning achievements of all children, irrespective of tribe or language. As a consequence the achievement of the third EFA goal (cf. 2.2.3.3), which is aimed at increasing the learning achievement to 80% of children under 14 years when teaching and learning is done in a mother-tongue language, becomes a possibility.

2.3.1.3 Learning environment

As mentioned earlier, increased enrolment led to overcrowded classrooms (cf. 2.3.1). Between the years 2004 and 2008, about 15% of the schools had to introduce overlapping shifts. In Malawi overlapping shifts work in the following way: Standards 1 and 2 are the morning, Standards 3 to 5 are taught in the afternoon, while Standards 6 to 8 stay at school from the morning up to the afternoon (overlapping with both shifts). During the hours when two shifts overlap, the schools are crowded and many classes are taught outside the classroom (UNESCO, 2008). However, the teaching time was allocated in this way so that school facilities could be utilised maximally (MoEST, 2004). Double shifts were also introduced in schools as an

interim approach to solving the problem of a lack of classrooms and teachers. In the double shift system in Malawi, for example, the Standard 1 pupils were divided into a morning and afternoon shift (UNESCO, 2008). However, in spite of all these arrangements, there was a high pupil per classroom ratio of 107 in the year 2006, which dropped slightly in 2011 (MoEST, 2011). The present situation of a rising enrolment rate with little or no commensurate classroom construction suggests that it would be a difficult task to achieve the target pupil per classroom ratio of 57 in 2017. In addition, this problem can equally impact on the realisation of the EFA goals within the Malawian school context.

2.3.1.4 Procurement and distribution of teaching material

The procurement and distribution of teaching material is a very important component in the implementation of FPE in any country. In order to realise the vision of FPE for its citizenry, the Malawian government in 2007/2008 received support from the World Bank and other international donors to procure and distribute about 4.3 million items of teaching material to primary schools (Japan International Co-operation Agency (JICA), 2012: 52). The Malawi Institute of Education is responsible for the development of teaching material, planning for its procurement, distribution and control, and principle of operation is stipulated in the *National School Textbook policy* of 2006 (Ministry of Education and Vocational Training, 2006b).

There have been some challenges associated with the distribution of textbooks to schools, especially in the case of remote schools with poor accessibility (World Bank, 2010: 182). This is particularly problematic during the rainy season, causing a delay in delivery. It has also been reported that in some cases schools may have received the required number of books, but teachers were reluctant to release them due to fears that some students may drop out of school. In other instances, some head teachers hoarded the books to offset the tendency of a future loss or shortage (World Bank, 2010: 182). In spite of all these apparent challenges, the FPE programme of Malawi remains committed to provide basic education of a high standard to poor and rural pupils. Addressing the mentioned challenges remains imperative as no sound and quality basic education can be delivered without an adequate supply of basic teaching material.

2.3.1.5 Teacher education system

The increase in pupil enrolment after the adoption of FPE has also led to the recruitment of new teachers (World Bank, 2010: 182). FPE cannot thrive without adequate teacher training, particularly in the setting of increased enrolment and curriculum assessment reform as seen in Malawi. In response to this requirement, six public teachers' training colleges and six private colleges were set up in Malawi (JICA, 2011:6). Whilst the World Bank was responsible for the construction of one public teachers' training college, the Malawian government constructed the other five. In order to secure the required number of teachers, the government started with the recruitment of assistant teachers in 2010 and subsequently trained 16 000 teachers between 2010 and 2013 (World Bank, 2010: 182). By implication, this initiative increased the number of primary school teachers and contributed to addressing the increasing need for qualified teachers to provide free and compulsory basic education in Malawi. In order to remain committed to the Jomtien Declaration for EFA, the training and re-training of teachers remain instrumental in ensuring the transfer of the basic skills, values and knowledge that Malawians need in order to survive.

In addition to the importance of teacher education, the construction of more classrooms remains a challenge (World Bank, 2010). This is of importance not only for the improvement of the pupil per classroom ratio, but also for the sufficient implementation of the student-centred curriculum.

2.3.2 Problems with FPE in Malawi

Although some progress has been made with the implementation of the FPE in Malawi, the FPE programme is still riddled by several problems. In this regard Chimombo (2005: 168; cf. also Kadzamira & Chibwana, 2000: 2) argues that the impressive achievements made with regard to increasing access to free primary education in Malawi must be balanced against a number of emerging problems. These problems include:

- i. Shortage of qualified primary school teachers,*
- ii. Poor strategic management of teachers,*
- iii. Inadequate and inferior physical infrastructure,*

- iv. *Inadequate teaching and learning materials,*
- v. *Poor monitoring and supervisory systems,*
- vi. *Poor access for children with special needs,*
- vii. *Poor retention of girls mainly from standards five to eight,*
- viii. *Negative impact of HIV/AIDS, and*
- ix. *Poor participation of school committees and their communities in school management (MGDS, 2006:50).*

Although these problems should all be considered as important in the realisation of the goals of EFA in Malawi, only some of the abovementioned problems will be discussed in this section.

Whilst the challenge of the shortage of qualified primary school teachers is linked to an increase in the enrolment rate following the implementation of FPE (cf. 2.3.1.5), inadequate training and the retraining of teachers probably poses as an equally strong reason for the shortage of qualified teachers. In addition this problem is further exacerbated by teacher attrition. In this regard, the World Bank (2010) has indicated that in 2007, 4 529 public primary school teachers left their schools, producing an annual attrition rate of 3.2%. About 60% of these teachers either retired (14.3%), suffered from chronic illness (7%) or died (37.2%). The departure of the other 40% of teachers has been linked to a poor sense of job satisfaction and motivation. The latter state of affairs subsequently informed the introduction of a special allowance for teachers in rural schools by the Ministry of Education and Science Technology (World Bank, 2010; MoEST, 2010). Another factor contributing to teacher shortage relates to the fact that female teachers, who constituted about 36% of all primary schools in 2011, are mainly concentrated in urban areas (MoEST, 2011).

Inadequate and inferior physical infrastructure is a real problem affecting the implementation of FPE, and according to Chimombo (2005: 168) many students are often left without classrooms, while teachers have to conduct lessons under trees. Statistics show that an average of 122 students occupied a classroom in some places in Malawi (National statistics office, 2006: 2). The pupil per classroom ratio was as high as 107 in the year 2006 and then dropped slightly to 105 in 2011

(MoEST, 2011). It can subsequently be accepted that the inadequate construction of classrooms and other supportive infrastructure should take a centre stage if Malawi wants to successfully implement FPE.

Whilst inadequate teaching and learning materials has also been indicated in 2.3.1.4 as a problem contributing to the eroding of the gains made in access to FPE, problems relating to achieving gender equity requires attention. The achievement of gender equity in primary school enrolment is of particular importance in Africa where female children's education is often undermined (UNICEF, 2007: 429). This issue remains an important problem which continues to confront the actualisation of the FPE programme in Malawi as a poor retention of girls persists, mainly from Standards 5 to 8 (Munthali, n.d.:49). Various scholars argue that the high drop-out rate of girls may be related to factors such as negative treatment of girls at school (Chimombo, Chibwana, Dzimadzi, Kadzamira, Kunkwenzu, Kunje & Namphota, 2000: 40-45), societal gender norms (Scharff, 2007: 1; Chimombo *et al.*, 2000: 40-45) and sexual harassment or violence (Kadzamira, Swainson, Maluwa-Banda, Kamlongera, 2001: 29; Scharff, 2007: 1). Household income also seems to also be a major contributing factor to the education of girls as most parents traditionally sent male children to school and used female children for farming to generate family income (Scharff, 2007: 1 & also Chimombo *et al.*, 2000: 40-45). Whilst households with a lower socio-economic status have a lower propensity to send their children to school, Kadzamira and Rose (2003: 501-516) argue that although parents do not have to pay fees because of FPE, they are still required to pay for, *inter alia*, exercise books, pens, and school uniforms. The withdrawal of the girl child is indeed counter to the objectives of FPE and of the Millennium Development Goals (cf. 2.1).

HIV and AIDS have also impacted negatively on the realisation of basic quality education in Malawi. In this regard, USAID (2000: 1 and also Kelly 2000: 42) has indicated that HIV/AIDS affects the educational system at virtually all levels, including the levels on which education policy planners, parents, teachers and even the students operate. A 1994 UNICEF report indicated that about 30% of households were headed by women. About a decade later, the prevalence rate was as high as 21.4% with over 290 000 children with only one living parent, and almost 150 000 orphans (NSO, 2005; UNAIDS, 2006). HIV/AIDS causes high school drop-out rates

as children may have to take care of very ill relatives. They may also have to fend for their families in cases where both parents are dead. Also, HIV/AIDS has increased teacher absenteeism and attrition (UNAIDS, 2006). Teachers are the focal point in any education system and without them education for all cannot be achieved. However, a decrease in the infection rate has been reported. A survey conducted by the National Aids Commission in conjunction with the Department of Nutrition and HIV/AIDS in the Office of the President, shows that the national prevalence rate of HIV and AIDS has dropped from 11.4% in 2008 to 10.6% in 2013 (Mkonda, 2013). According to the document *The Status of HIV/AIDS Profile in Malawi*, in the past years about 80,000 people tested HIV positive per year, compared to 2013 when 40,000 to 50,000 people tested positive (Mkonda, 2013). The consequence of the decrease in HIV/AIDS infection and infection is that it should also contribute to a reduction in the students' drop-out rate from schools. The expectation is subsequently a positive effect on the actualisation of EFA goals.

I initially worked with the assumption that since Malawi was the first country in East Africa to launch and implement FPE they should have a well-developed free and compulsory basic education system two decades later. However, my literature study has revealed that the implementation of FPE in Malawi is not without problems. Rather it is clear that the challenges of the EFA agenda in Malawi are not just about enrolling children in schools to receive free basic education. Much still needs to be done in Malawi to realise the dream for quality free and compulsory basic education.

In the next section the focus will be placed on FPE in Uganda. In this regard, attention will be given to the outcomes of the implementation of FPE, but also to the problems experienced with its implementation.

2.4 UNIVERSAL PRIMARY EDUCATION IN UGANDA

Following the growth of democracy in Uganda and in response to the Jomtien Declaration, the Ugandan government introduced and launched Universal Primary Education (UPE) in January 1997 (Ndeezi, 2000: 1). According to the Ministry of Education and Sports (2008a: 1) the purpose of UPE was to provide the necessary facilities and resources to enable all Ugandan children of school age to enrol in basic education and complete the primary cycle. In order to actualise this, the government

announced free education for a maximum of four children per family, and announced the non-payment of school fees from grades 1 to 7 (Ministry of Education and Sports, 2008a: 1). It was further stated that UPE was to be achieved by the year 2000 for grades 1 to 5, and for the whole primary circle by the year 2003 (Ministry of Education and Sports, 2004: 9). Based on this, I argue that the abolishment of fees in the first seven grades will go far in enhancing the realisation of UPE in Uganda because it should enable all pupils to enrol in schools.

The Ugandan Ministry of Education and Sports (1999: 10) noted that the main objectives of UPE are:

- a) *to provide and maintain quality education as well as to promote human resource development;*
- b) *to bring about a change in society in a positive manner;*
- c) *to provide facilities that will enable the child to be enrolled in a school and remain there until he/she completes primary schooling;*
- d) *to eliminate inequalities and disparities in the education system, thereby making education equitable;*
- e) *to make education affordable for the majority of Ugandans;*
- f) *to meet national goals and make education accessible to learners;* and
- g) *to equip people with basic skills, thereby reducing poverty in the country.*

All of these objectives align with the goals as outlined in the Jomtien Declaration on EFA (cf. 2.2.2) and are in tandem with the MDG 2 and 3 (cf. 2.1). One would therefore expect that education in Uganda will indeed be aimed at ensuring all Ugandans to acquire quality basic education.

2.4.1 Consequences of UPE

The implementation of UPE in Uganda is associated with various consequences, including an increase in enrolment, a teacher development management system, curriculum reassessment, a comprehensive programme for the improvement of quality in primary education, the introduction of a funding initiative, an education sector plan, the provision of instructional materials, and the support of girl child education.

2.4.1.1 Enrolment increase

Arising from the launching and subsequent implementation of UPE in Uganda, there was an increase in the enrolment rate of pupils. Gross enrolment in primary schools rose from 3.1 million in 1996 to 6.8 million in 2003. This led to an increase of about 140% (3.7 million children), compared to an increase of 39% (0.9 million children) between 1986 and 1996 (Ministry of Education and Sports, 2007a:3). In order to address the rising enrolment rate and to improve the quality of education, the Ministry of Education and Sports embarked on aggressive classroom construction which contributed to the reduction of a pupil classroom ratio from 106 pupil per class to 72 pupil per class (Ministry of Education and Sports, 2007a: 3). The ministry also outlined pathways to improve human development which included the training and retraining of teachers and the training of management teams, and dedicated supervision of schools (Ministry of Education and Sports, 2007b: 39). Whilst the implementation of UPE led to an increase in enrolment, the addressing of accompanying challenges underscores the importance the Ugandan government places on education and their commitment to enhance the UPE programme.

2.4.1.2 Teacher Development Management System

Following the launching of FPE, the Teacher Development Management System (TDMS) was introduced in 1994 as a project of USAID to re-establish teaching and make it a respected profession, to create a support system through restructuring teacher training services, to ensure community participation and to institute a sustainable system of allocating resources (Ward, Penny & Read, 2006: 76; Nansamba & Nakayenga, 2003: 2). As a national support system, the intention was for TDMS to aid with the rapid and effective introduction of new instructional material, with new methods and curriculum assessment techniques, with increased access to learning opportunities, and with the improvement of school management and instructional quality (Nansamba & Nakayenga, 2003: 6). This state of affairs again underscores the commitment of the Ugandan government to implement their UPE programme, and by implication, to actualise the EFA goals.

2.4.1.3 Curriculum reassessment

About 6 years after the introduction of free education in primary schools, there was a reassessment of the primary school curriculum which summarised that the poor performance in all curriculum subjects was as a result of a lack of early literacy (Ward *et al.*, 2006: 42). A new primary school curriculum was therefore introduced by the Ministry of Education and Sports in 2007. This new curriculum was divided into three cycles each having a single structure of knowledge, skill and learning outcomes based on the expected levels from learners in different grades (IOB, 2008: 43). The curriculum reassessment was primarily aimed at encouraging child growth and maturity, and at preparing the child for upper primary education, whilst simultaneously developing good English skills (Ward *et al.*, 2006: 42-44).

2.4.1.4 A comprehensive programme to improve quality in primary education

Because quality is regarded as a major indicator of education, the Ugandan government introduced initiatives to improve the quality of primary education. These initiatives were in response to a continuous poor performance in numeracy and literacy by pupils over the preceding years, in spite of huge sums of money invested in the primary education sector. The low learning outcomes were related to the low quality of primary education (Ministry of Education and Sports, 2005b: 25).

To address the problem of quality in UPE the Ministry began with a comprehensive programme based on the principles of quality, access, efficiency and sustainability for the purpose of enhancing quality and overcoming learning achievements (Ministry of Education and Sports, 2008b: 4). Focused in particular on the school level, the aim was to improve the teaching and learning environment, especially the improvement of literacy, numeracy, and basic life skills underperforming districts. The focus was to provide qualified teachers in order to reduce constraints within the schools, to provide instructional materials to facilitate children learning and developing the required knowledge in literacy and numeracy, the supervision of student performance through attendance, and the provision of classrooms (Ministry of Education and Sports, 2008b: 5). The initiatives also included the improvement of teachers' standard of living by providing them with accommodation, of implementing a scheme to upgrade

school levels of supervision, and efforts to reduce the teacher/student ratio in lower primary in order to achieve a higher rate of literacy and numeracy (Nambalirwa, 2010: 42).

Other initiatives included the increase of support supervision to avoid absenteeism while ensuring accountability to the stakeholders, and the introduction of a non-monetary reward system while enforcing customised performance targets. Also important is community involvement through dissemination of information to the community to create awareness and encourage parents' participation in assessing school performance (Ministry of Education and Sports, 2008b: 18). Once again, it could be argued that the Ugandan government exhibits a strong commitment to improve the quality of teaching in primary schools.

2.4.1.5 Introduction of a funding initiative

In addition to the abovementioned initiatives, the government of Uganda also introduced a financial initiative for UPE. Following the increase in enrolment after the implementation of UPE, a need for more classrooms, textbooks, desks, toilets, teachers and water arose. Because of this state of affairs, the government introduced the School Facilities Grant to enable needy schools to construct more classrooms and to complete those built as a result of UPE, replacing the centralised system of the World Bank (Ward *et al.*, 2006: 115). The availability of this fund brought about a change in Uganda with almost every district receiving a minimum of two classrooms (Ward *et al.*, 2006: 118). This is a commendable initiative, as finances remain a focal point in the development of not only the necessary infrastructure to improve education, but also in the operationalisation of UPE.

2.4.1.6 Education Sector Plan

Additionally, the government of Uganda also set up the *Education Sector Strategic Plan 2004/2015* to replace *the Education Sector Investment Plan of 1998-2003* that was initially set up at the point of the launching of free education for primary school pupils. The objectives of the *Education Sector Investment Plan* were the achievement of equal access to education at all levels, the raising of education service delivery, and the development of the capacity of the Ministry of Education to

plan, programme and manage an investment portfolio to help develop the education sector effectively (Byamugisha & Ssenabulya, 2005: 8). Although the Education Sector Investment Plan was replaced by the Education Strategic Sector Plan, but its emphasis is still on the implementation of UPE and in assisting the ministry to fulfil its mission, which is “to support, guide, regulate, coordinate and promote quality education and sports to all Ugandans for national integration, individual and national development” (Bitamazire, 2005: 2). The objectives of the Education Strategic Sector Plan include the development of an educational system that is important to Ugandan’s national development, to see that every child realises the education goals at the primary level, and to maintain an efficient and effective education sector (Ministry of Education and Sports, 2010: 9).

2.4.1.7 Provision of instructional materials

For the UPE programme to be effective, the government introduced an initiative for instructional materials. Instructional materials are not only essential tools for teaching and learning, but they also help to raise the morale of teachers and pupils. The Ugandan Ministry of Education and Sports introduced a body called the Instructional Materials Unit (IMU) to ensure the availability of instructional material. It is the duty of the IMU to process instructional materials, to co-ordinate, plan and distribute materials from the national level to the districts, and to monitor how the materials are used in schools (Nishimura & Ogawa, 2009: 120).

In this regard, I agree with Lockheed and Verspoor (1991: 47) that instructional materials are vital for effective learning, and no curriculum can be adequately implemented without it. The Ugandan government’s enactment of the IMU and its subsequent attempt to ensure that instructional materials are effectively distributed, especially to schools that need them first, seems to coincide with their commitment to successfully implement UPE.

2.4.1.8 Support of girl child education

In order to eliminate gender disparity in the education system, the government of Uganda initiated a series of programmes aimed at supporting girls in basic education. This is important and in agreement with the MDG 3 which focuses on eliminating

gender disparity in education by 2015 (United Nations Millennium Development Goals, 2000). The Ministry of Education initiated programmes like the girl education movement with the aim to promote quality education for girls. It places the emphasis on the enrolment of girls, giving help to girls with special needs, and getting the community to support girl child education (Nishimura & Ogawa, 2009: 124). Additionally, in 2008 the Ministry of Education developed a gender education policy to ensure fair involvement for all, to ensure a system of education where the skills and knowledge provided are applicable to both males and females, and to ensure a system of education not influenced by gender. The support of and initiatives for girl child education are in line with the MDG goal 2 and 3 as stated earlier (cf. 2.1), which focus on ensuring that all children have access to and complete a full course of primary schooling, and to also eliminate gender disparity in education by 2015. I therefore argue that the education of the girl child contributes to the realisation of UPE.

2.4.2 Problems with UPE in Uganda

Despite the strong commitment of the Ugandan government to successfully implement UPE, it has not been without problems. Problems experienced by the Ugandan government with regard to the implementation of UPE include, *inter alia*, poverty, population change, HIV/AIDS, and conflict.

2.4.2.1 Poverty

Despite the efforts of the government to bring UPE to the people, poverty is proving to be a major hindrance in the effective implementation of UPE in Uganda. A study carried out by the World Bank (2000: 34) refers to poverty as a lack of income and assets to obtain basic needs, and therefore a lack of power and voice to influence the world. From 1986 Uganda grew from a state of civil strife, a lack of respect for human rights, unemployment and utmost poverty, to a country of high economic growth as a result of having good macroeconomic management. Various policies were put in place by the government to help build the economy. However, Uganda is still rated among the poorest countries in the world. The United Nations Development Programme's Human Development Index (2008: 1) states that Uganda ranks 154th out of 177 countries. Income inequalities measured by the Gin coefficient

stands at 0.43% and 37.7%, 41.1% and 12.2% of the citizens are living below the poverty line in national, rural and urban areas respectively (Ministry of Finance, Planning and Economic Development, 2004: 13). According to Yan *et al.*, (2007: 2) the relationship between poverty and UPE could be assessed on the grounds of a sustainable livelihood framework. Yan *et al.*, (2007: 5) also noted that whilst exposure to education increases human capital development through skill acquisition, it also enables the poor to make good use of their belongings. Although UPE connotes that families do not have to pay school fees, they still have to buy uniforms and books (Bategeka & Okurut, 2006: 1), and as a consequence, UPE may amount to increased dropout rates due to the fact that some parents cannot afford to pay for these other expenses. In order for the UPE programme to be successful, the Ministry of Education and Sports has to address the impact of poverty on education.

2.4.2.2 Population change

Another factor that hinders the success of UPE in Uganda is the change in population. Uganda is an area of 241,038 square kilometres, and has one of the highest population growth rates in the world at 2.69%. Uganda's fertility rate is at 6.77%, which makes it the third in the world after Nigeria and Mali (Index Mundi, 2009a: 1; Index Mundi, 2009b: 1). Population and education are two concepts that cannot be separated and for one to succeed the other cannot be ignored. The number of people in a geographical area impacts on education in many ways, such as enrolment levels, budget and finance considerations, and infrastructure development (UNESCO, 2000: 1).

It has been noticed that different variables such as lower fertility rates, lower maternal mortality rates, lower infant mortality and greater life expectancy impact on the population dynamics of a country in one way or another and the implementation of policies like the UPE (UNESCO, 2000: 1). It can be argued that education plays a vital role in economic and social matters in a society and is therefore a major key to economic growth. Bella and Belkachla (2009: 1) indicate that there is a two-way relationship between education and population. Population can therefore either hinder or facilitate the achievement of UPE. Literature from the United Nations (2003: 1), the Uganda Joint Assistant Strategy (2005: 5), as well as Bella and Belkachla (2009: 1) indicates that education is related to demographic behaviours

such as the reduction in levels of fertility, the determination of the desired family size, increased family planning, the reduction in the mortality rate and migration. Exposure to education increases the age at which people get married, and it increases the value system and beliefs of women towards marriage as educated women tend to get married at a later stage and are more determined to find jobs and take responsibility to raise their children (Bella & Belkachla, 2009: 1).

It is to be expected that an increase in population will result in an increase in enrolment, which will lead to an increase in the demand for classrooms, instructional materials and teachers. As such, a huge demand is placed on the country to pay for the delivery of educational infrastructure. The implementation of UPE in Uganda is subsequently also affected by demographic trends and changes in population growth, all of which impact on the future education planning process in Uganda.

2.4.2.3 HIV/AIDS

HIV/AIDS is another factor that impacts on the implementation of the UPE programme in Uganda. Statistics in 2000 showed that 70% of HIV cases and 72% of new infections were all seen in Africa (Coetzee, 2001: 5 in Van Dijk, 2003: 101). More people are becoming infected with HIV in Uganda - HIV prevalence has been rising since its lowest rate of 6.4% in 2006. According to UNAIDS (2012), 7.2% of Uganda's population are currently living with HIV, with 150,000 new infections diagnosed per year, of whom 20,600 are children. This amounts to an estimated 1.4 million people, which includes 190,000 children. An estimated 62,000 people died from AIDS in 2011 and 1.1 million children have been orphaned by the epidemic in Uganda (UNAIDS, 2012).

The increase in the number of people living with HIV/AIDS will hinder the realisation of the goals of EFA and MGD 2, which focuses on ensuring that all children have access to and complete a full course of primary schooling (United Nations Millennium Development Goals, 2000).

Almost a quarter of the people living with HIV in Uganda are part of the education system, either as students or as staff (Daily Monitor, 2012). An infected teacher loses professional working time when battling the disease and this leads to high

attrition rates as a result of death, self-stigma and discrimination (Kelly 2000: 58; Ministry of Education and Sports, 2006: 12). This is indeed problematic as teachers occupy a focal position in the education system. In addition, the virus is also very common among the youth between the ages of 15 and 19, and 84% of cases is commonly transmitted through heterosexual intercourse. Other modes of transmission include mother-to-child transmission, sharing of unsterilised sharp equipment, circumcision, widow cleansing and inheritance, which are all results of illiteracy and ignorance (Kakuru, 2008: 37). HIV/AIDS subsequently has an impact on the number of orphans of school-going age, but also on teacher absenteeism. One could therefore deduce that the realisation of the UPE programme, and the EFA goals, is also hampered by HIV/AIDS.

2.4.2.4 Conflict

Conflict is defined as antagonism between opposing forces, reflecting a range of opinions, preferences, needs or interests (Heywood, 2007: 447). Uganda has experienced a series of wars, both before and after independence. The worst and on-going conflicts to date are between the Lord's Resistance Army and the National Neighbouring Districts in the eastern parts of Uganda (Nanyonjo, 2005: 473). The conflict has resulted in gross violations of human rights, thereby paralysing economic development and leading to the breakdown of culture and society, including the destruction of infrastructure such as schools (Ministry of Finance, Planning and Economic Development, 2004: 100; Higgins, 2009: 1).

According to UNICEF (2007: 1) more than 1.3 million people have been displaced in the northern part of Uganda, of which 80% are women and children. The conflicted region in Uganda remains the poorest in the country with an average of 63% of the population surviving on one American dollar a day (The Millennium Development Goals Report, 2012: 5). As a result of this continuous crisis, education has suffered a great deal. Schools have been forced to close, teaching hours have been reduced and teachers are compelled to find safer school environments (Kitgum District, 2005: 38). In the Kitgum district, 86% of the schools were displaced and forced to re-establish themselves as part of other schools, resulting in overcrowded classrooms, inadequate infrastructure and poor performance by pupils (Kitgum District, 2005: 38). UPE statistics also show that the northern region of Uganda has the highest teacher

to pupil ratio at 151:1, with a 41% failure rate in primary-leaving examinations (Nanyonjo, 2005: 480). The implementation of the UPE programme in Uganda seems to be hampered, especially in districts riddled with on-going conflict. Despite the commitment of the Ministry of Education and Sports to realise EFA in Uganda, the successful implementation of UPE remains problematic in some districts. The aim of ensuring access for all children to schools, and the completion of a full course of primary schooling, is no straightforward matter in Uganda.

As indicated earlier (cf. 2.1), my decision to work with Uganda was primarily informed by the fact that the Ugandan government launched and introduced UPE in January 1997, 7 years after the Jomtien Declaration. Although the Ugandan government announced education with non-payment of school fees from grades 1 to 7 (Ministry of Education and Sports, 2008a: 1), the implementation of UPE is not without problems (World Bank, 2000: 34; Harvey, 1998: 8).

In the next section, attention will be given to the implementation of free and compulsory education in Kenya.

2.5 UNIVERSAL PRIMARY EDUCATION IN KENYA

Following the Jomtien Declaration for EFA in 1990, free and compulsory education reform was launched and implemented in January 2003 in Kenya. This followed from the 2002 general election that brought President Mwai Kibaki into power. In this regard it is important to indicate that the introduction of free primary education was regarded as the fulfilment of one of the election promises of the National Rainbow Coalition party that won the election in 2002 (Kenya, 2008: 5). Although this introduction appears to be in line with Marshal and Peter's statement (1999: 1; cf. also Du Toit & Van der Walt, 1997: 104) that most major decisions concerning education is a political act, it should be acknowledged that this initiative had as its purpose, the making of primary schooling accessible to all young Kenyans of appropriate age (Oketch & Somerset, 2010: 11).

In Kenya the concept of Universal Primary Education (UPE) was adopted and understood as synonymous with the EFA's goal to make primary education free, especially for children from poor economic backgrounds. The Kenyan government

framed the UPE agenda within the context of the *Kenya Children's Act* of 2001 (Section 7(1)) according to which “[e]very child shall be entitled to education, the provision of which shall be the responsibility of the government and parents”. Section 7(2) affirms the right and entitlement of every child to free basic education which shall be compulsory in accordance with Article 28 of the UN Convention on the Rights of the Child.

2.5.1 Consequences of UPE

Although the UPE programme was implemented on political grounds in Kenya, the government's drive to achieve UPE can be regarded as a commitment to human rights, which is in agreement with the adopted conventions of the Jomtien Declaration (Kenya, 2008: 5). The government of Kenya considers the provision of basic education and training for all Kenyans as important and particularly fundamental to its overall development strategy. In this regard, the government views education as

[a] long term objective to provide basic quality education to enhance Kenyans' ability to preserve and utilize the environment for productive and sustainable livelihoods, to develop quality of the human race; to realise the universal access to education and training for all including the disadvantaged and the vulnerable and as a necessary tool for the development and protection of the democratic institutions of human rights (Ministry of Education Science and Technology (MoEST, 2005: 2).

Whilst the programme include “access, retention, equity, quality and relevance and internal and external efficiencies within the education system” (MoEST, 2005: 3), a positive actualisation of basic education has been reported. In this regard, positive mention has been made on student enrolment, infrastructure and curriculum reform, drop-out rates and the training of teachers.

2.5.1.1 Student enrolment, infrastructure and curriculum reform

Following the launch of UPE in 2003, the Kenyan government redefined basic education as free primary education for the first 12 years of schooling. As a consequence, the rate of pupil enrolment rapidly increased. For example, in 2005 an increase of 90% was reported and a total of 1.5 million children, with little difference

amongst girls and boys, were enrolled in primary schools in Kenya between 2002 and 2005 (MoEST, 2005: 2; UNICEF, 2007). Whilst the increase of enrolment was due to the fact that school fees were abolished, poor and less privileged children were now given unhindered access to basic education.

In response to the increase in the enrolment rate, it became important to improve on the infrastructural and training support to meet increased demands. In order to achieve this, the budgetary allocation to education was increased in 2005 from 12.7 billion Kenyan shillings to 92.3 billion shillings (UNICEF, 2006). In addition, the Kenyan government introduced an improved curriculum aimed at promoting national unity, and economic, cultural and social aspirations for the people of Kenya (MoEST, 2005: 2). Appropriate budgetary allocation and additional investment in curriculum reform is a prerequisite for the successful implementation of UPE and the subsequent realisation of EFA goals.

2.5.1.2 Drop-out rates

According to the Ministry of Education Science and Technology (2007), there has been a reduction in the drop-out rate in primary education for a period of four years. The drop-out rate declined further in 2007 and it appeared to be more between grades 7 and 8 (Otieno & Colclough, 2009: 15). The implementation of UPE in 2003, which is associated with the reduction in the direct cost of schooling, contributed to this trend. This reduction in the drop-out rate may therefore be seen as the result of an education system that eliminated financial and other barriers (MoEST, 2007). As a consequence, it could be argued that the increase in enrolment and the decrease of drop-outs not only contribute to Kenyans acquiring the relevant skills to become better citizens, but also support the realisation of the goals of EFA.

Increased enrolment and the decrease of the drop-out rate subsequently led to a greater demand in instructional material like textbooks that play a vital role in the teaching and learning process. As the availability of textbooks and other instructional materials impact on pupil achievement, the government of Kenya began to provide textbooks to schools to support children (Wasanga & Ryan, 2007: 5). In this regard, it seems that the Kenyan government is committed to the successful implementation of UPE.

2.5.1.3 Training of teachers

After the adoption of UPE, the Kenyan government started to replace untrained teachers in primary schools with the help of an intensive in-service teacher training programme (Ogwel, 2007: 1). This donor-funded initiative included programmes aimed at improving teacher competence, classroom management and the improvement of the pupil-teacher ratio. As this initiative helped to address the increased enrolment in schools, it underscores the commitment of the Kenyan government to make UPE a reality for the Kenyan people.

2.5.2 Problems with UPE in Kenya

Although some progress has been made in Kenya with regard to the implementation of UPE (cf.2.4.1), the implementation itself is not without problems. The problems include, *inter alia*, poor involvement and education of parents, an increase in enrolment, teacher shortage, and delays in fund disbursement, inadequate instructional materials, and HIV/AIDS.

2.5.2.1 Poor involvement and education of parents

A study done by UNESCO (2005) indicated that the implementation of the UPE programme, without proper consultation, contributed to hampering its goal attainment. Parents do not have a good understanding of the word *free*; rather, they felt they would no longer take part in school activities like voluntary contributions or fund drives (UNESCO, 2005). However, parents are major stakeholders in any education system and should therefore be adequately involved in the education of their children. Parents should also be educated concerning any educational policy involving their children. If this is not given the necessary attention by a government, education policies may not include maximal cooperation from parents. As such, the non-involvement and non-consultation of parents can indeed play a hampering role in the effective implementation of the UPE programme.

2.5.2.2 Increase in enrolment

Although the introduction of UPE led to an increase in enrolment, thereby granting more children access to education, it introduced a problem. Kenya was faced with the problem of over-enrolment (Kenya, 2008: 5). Kenya (2008: 5) further stated that

whilst the increase of enrolment contributed to making classrooms overcrowded, teaching became difficult. This hindered learners from getting the necessary attention, and in turn, hampered the quality of learning. Munyao (2004: 1) also indicates how over-enrolment affects the quality of education and affects factors such as teaching methods, seating arrangements, working space, sanitation, examination and assessment. In circumstances of overcrowding, the child's right of enjoying a comfortable learning environment is subsequently denied (UNESCO, 2009). While primary school teachers are presently trained to handle 40 pupils and not a crowd (Jones, 2012: 7), the Kenyan government seems to be committed to address this problem in order to ensure the success of UPE.

2.5.2.3 Teacher shortage

The increase in the number of students amounted to a shortage of teachers and an increase in their workload. The shortage of teachers is a serious problem which hampers the provision of free and compulsory education. Whilst the *Daily Nation* (2003) indicated that some schools do not have staff, the teacher to pupil ratio was placed at 1:40; signifying an increase from 1:33 in 2002 (Saitoti cited in Mwaniki & Bwire, 2003). It subsequently became important for the government to recruit more teachers, but this, however, was not adequately addressed due to insufficient funds to pay new teachers (Aduda, 2003: 3). The shortage of teachers has several implications, including the inability of teachers to pay enough attention to all learners so as to provide quality education. UNESCO (2005) also indicated that teachers cannot give sufficient assignments to pupils because they are unable to cope with the marking and teaching workload. In response to this challenge, a donor funding initiative was introduced in 2007 with the aim of training and retraining teachers to improve teacher competence, classroom management and the pupil-teacher ratio (cf.2.5.1.3). In spite of this initiative, the UPE programme in Kenya still suffers from a shortage of quality teachers (Education International, 2011). As a consequence, the government has difficulty in delivering sound and quality basic education to all.

2.5.2.4 Delays in fund disbursement

Although the introduction of UPE brought about an increased budgetary allocation to education, there were challenges in fund disbursement for its actualisation. Since

the adoption of UPE in 2003, the government had spent 7.9 billion Kenyan shillings on UPE. Furthermore, 10.5 billion shillings was spent in the fiscal year 2003/2004 in order to put 1.6m children in school (Republic of Kenya, 2003). The government released 519m shillings through the Ministry of Education, Science and Technology to more than 18,000 primary schools to buy materials. MOEST developed an account for people and co-operate organisations to donate funds for the adequate implementation of the UPE program. The UNICEF fund was distinguished for the purchase of basic education kits, the training of 5,000 teachers, and the repair and rehabilitation of classrooms (<http://www.unesco.org>). Despite the increase in education spending, more money is still needed as the current funding is not sufficient to meet the increasing demand for funds (Chabari, 2010: 20). Quality education can be achieved without finance and for UPE to be successful and achieve its goal, the Kenyan government has to solicit and distribute more funds.

2.5.2.5 Inadequate instructional materials

A lack of instructional materials also hampered the growth of UPE in Kenya. In this regard, Chabari (2010: 18) indicates that the absence of instructional materials was a major challenge faced by the Kenyan education system. Whilst the UPE programme was designed in such a way that each child can claim free writing materials and textbooks, one textbook had to be shared by 5 pupils, and, as a consequence, students' accessibility to books while at home, was affected (Ogola, 2010: 8). As most of the students have to do their homework very early in the morning on the day of school, the quality of education was compromised. It can therefore be stated that problems experienced with the inadequate provision of instructional material will have implications for the effective implementation of not only the UPE programme in Kenya, but in particular for the realisation of the MGD goal 2. This goal focuses on ensuring that all children have access to and complete a full course of primary schooling (United Nations Millennium Development Goals, 2000).

2.5.2.6 Effects of HIV/AIDS

As in the case with Malawi and Uganda, HIV/AIDS is also a major factor that hinders the actualisation of UPE in Kenya (Ogot, 2004; Chang'ach, 2012: 55-57). Africa accounted for 73.3% of AIDS-related deaths and 11 million AIDS orphans (78.6% of

AIDS orphans in the world) in 2001 (Coetzee 2001: 5 in Van Dijk 2003: 101, White, 2003). Eastern and southern Africa is the centre of HIV/AIDS on the continent, and according to UNAIDS (2010) Kenya had a 6.3% estimated HIV/AIDS prevalence with about 80,000 estimated deaths in 2009 and 1,200,000 estimated orphans. The HIV/AIDS epidemic has a negative impact on the demand for education in Kenya. First and foremost, there will be fewer children of school age because of the impact on the population size of the country (Ogot, 2004; Chang'ach, 2012: 56). Consequently, fewer children will be able to complete schooling. In particular, girls are taken out of school more often than boys to help care for sick family members, or to help make up for lost family income.

Furthermore, the demand for educational services also declines, because of reduced family resources available for schooling in AIDS-affected households (Ogot, 2004; Chang'ach, 2012: 56). What is being experienced in Kenya is a considerable rise in the number of orphans in the country, and as many orphans also live in child-headed households without basic services, schooling may seem a far-fetched ideal. As these children are deprived of psychological and material support which their parents should have provided, their learning in schools are drastically affected (Chang'ach, 2012: 56). Not only pupils are affected by HIV/AIDS. There is also illness and death among the UBE administrative staff, which in turn negatively affects the education system's ability to plan, manage and implement policies and programs (Chang'ach, 2012). Due to the loss of trained and experienced teachers, and the subsequent interruption of teaching programmes, the planning and managing of educational resources, including the projection and planning of future teacher deployment, management and recruitment have become extremely difficult. It could therefore be deduced that whilst the quality of education does not escape the effect of HIV/AIDS, Kenya's weakened education system adversely impacts on the effective realisation of the UPE programme and the EFA goals.

The introduction of the UPE policy in Kenya was an important step toward the realising of EFA. The introduction of the programme brought about relief to poor parents who found it difficult to send their children to primary schools. However, the UPE policy met some drawbacks in schools. With the abolishment of school fees, children flocked into the schools and the most notable challenge was overcrowded

classrooms (Kenya, 2008: 5). As a consequence a shortage of teachers and adequate instruction material followed. Whilst the Kenyan government seems to be committed to effectively implement the UPE programme, the introduction thereof caused a particular chain reaction which brought about new challenges.

In Malawi, Uganda, and Kenya the implementation of free and compulsory education signifies strong government commitment towards the EFA goals aimed at enabling all children to receive free and compulsory education. In all three countries, the most apparent impact of universal primary education can be seen in the increase in learner enrolment. However, although free and compulsory education in these countries is aimed at making education available to all, the implementation thereof has been met by various challenges such as overcrowding of classes, a shortage of teachers and inadequate provision of teaching materials. Whilst it could be argued that these are logical consequences of the implementation of free and compulsory education, all three countries seem to remain committed to the realisation of the goals of EFA.

2.6 CONCLUSION

The aim of this chapter was to describe free and compulsory education as implemented by three African countries, namely Malawi, Uganda and Kenya. As indicated, all three countries were signatories of the *Jomtien Declaration on Education for All* in 1990, and as a result they committed themselves to the realisation of free and compulsory basic education in their respective countries. My contention with this chapter was to gain information about the way in which the implementation of free and compulsory education is experienced on the African continent. I believe that such information can be helpful in gaining an understanding of the extent of implementation of free and compulsory education in Nigeria. In addition, my understanding of free and compulsory education in these countries will also inform my policy analysis.

In the next chapter, a policy analysis will be undertaken of the *UBE Free and Compulsory Basic Education policy* of 1999 and the *Rivers State Universal Basic Education Law* of 2005.

CHAPTER 3: ANALYSIS OF NIGERIAN UBE POLICIES

3.1 INTRODUCTION

In the previous chapter the situation regarding free and compulsory education was described as experienced by three African countries namely, Malawi, Uganda and Kenya. These countries' perceptions and experiences regarding free and compulsory education were reviewed for two reasons. On the one hand, all three of them are signatories of Education for All as contained in the Jomtien Declaration of 1990. In order to achieve EFA, it is expected that these countries will not only make basic education free and compulsory for their citizens, but will remain committed to providing human and material resources needed to deliver quality and equitable basic education to children, youths and adults. On the other hand, it is my contention that an African perspective on free and compulsory education has the potential of informing my own analysis and understanding of the *Universal Basic Education Policy* (1999) and the *Rivers State Universal Basic Education Law* (2005). In this chapter, these two policies will be analysed in order to gain an understanding of the implications of these policies.

3.2 POLICY AND CRITICAL POLICY ANALYSIS

Critical policy analysis is used in this chapter to analyse the *Universal Basic Education Policy* (1999) and the *Rivers State Universal Basic Education Law* (2005). I will first give an exposition of what policy entails before explaining critical policy analysis. Hartshorne (1999: 5) gives a comprehensive definition of policy when defining it as "a course of action adopted by government, through legislation, ordinances and regulations, and pursued through administration and control, finance and inspection with the assumption that it would be beneficial to the country and the citizens". Policy, therefore, is closely linked to decisions that set guidelines for future decisions, initiate actions, or guide the implementation of previous decisions. Policy-making is the first step in any planning cycle and those who plan must appreciate the pattern of policy formulation before implementation and evaluation procedures can be effectively designed (Fabunmi, 2005: 2). Najam (2005) refers to three basic components of the policy process, namely policy choice, policy implementation and

policy assessment. With policy choice, the government and society formulates the goals that are to be achieved and the types of policy instruments that could assist to achieve the goal. Following the implementation of these instruments, assessment links policy choice to implementation and asks if the goal is being achieved, and if not, why this is the case. These three areas of the policy process must be mobilised in order for the policy to be effective. Colebatch (1998: 6-7) describes policy as multidimensional that provides at least three elements, namely authority, expertise, and order.

With regard to the analysis of policy, various definitions are presented in the literature. Ulrich (2002: 1) regards policy analysis as a field of professional practice that is concerned with the scientific analyses of the content and consequences of policies. Patton and Sawicki (1993: 6), on the other hand, are of the opinion that an analysis of policy “is the breaking up of a policy problem into different components, getting understanding of the components and develop ideas on what to do”.

In this particular study, critical policy analysis (CPA), as proposed by Taylor, Rizvi, Lingard and Henry (1997), will be used. Taylor *et al.* (1997: 20) explain CPA as a synthesising and interdisciplinary field of study which can contribute towards an understanding of policies that are already in place, or it can assist in creating pressure towards a new policy agenda. Whilst CPA can subsequently be both reactive and proactive, it also has the potential to promote a better understanding of policy by explaining the connection between local practices and external contexts (Taylor *et al.*, 1997: 20). In sum, it could be stated that CPA assigns meaning to the context within which a policy arises, evaluates how the policy-making process is arranged, assesses policy content in terms of a particular set of educational values, investigates whose interest the policy serves, explores how it might contribute to political advocacy, and examines how a policy has been implemented, and its subsequent outcomes (Taylor *et al.*, 1997: 20). All of this is informed by three basic assumptions, namely that education is a moral ideal linked to concerns of social justice, that education policies and practices must be aligned with the moral vision of a country, and that values cannot be avoided in policy analysis and should therefore be made known and argued for up front (Taylor *et al.*, 1997: 19).

Framed within the context of CPA, both a context and a content analysis of the *Universal Basic Education Policy* (1999) and the *Rivers State Universal Basic Education Law* (2005) will be undertaken. It is my contention that a policy analysis of these policies will not only help me to understand the issue of free and compulsory education from a policy perspective, but will further assist me in my attempt to explore the consequences of the extent of implementation of the UBE policy. However, before I engage in the critical policy analysis of both policies, I regard it necessary to first provide a general background of basic education in Nigeria. Since the latter underpins both the *Universal Basic Education Policy* and the *Rivers State Universal Basic Education Act*.

3.2.1 Basic education as policy background

Nigeria is a multi-ethnic country with cultural diversities of no less than 350 distinct ethnic groups and diverse indigenous languages with a population of about 140 million people (National Census Report, 2006). The idea of universal education was first mooted in 1955 when the UPE scheme was inaugurated by the government of western region of Nigeria. The eastern Nigerian government launched its own universal primary education in 1957. In northern Nigeria, education was provided free by government in a bid to enable children to attend school (Adeyemi, 2007). At its onset, the universal primary education scheme had been undertaken by regional governments. These offered regional programmes with many inequalities in the basic education status of the Nigerian child, leading to federal government intervention in 1976 when the UPE was launched nationally to cover the whole country.

Globally, basic education is described as the most important foundational tool for national development (Obani, 1996: 5), and serves as a foundation for the whole educational pursuit which is expected to provide literacy and enlightenment to citizens. In Nigeria, basic primary education is defined as the education given in an institution for children from ages 6 to 13 (Federal Republic of Nigeria, 2004). As a consequence, basic education not only constitutes the bedrock upon which the entire education system is built (cf. Oni, 2008: 3), but also determines its successes and failures. In addition, basic education can also be defined as the universalisation of access to education (Denga, 2000: 1-2). Everyone, irrespective of class, race,

culture or tribe, should have access to basic education. Such access is also in line with the visions and goals as defined at the *Jomtien Declaration on Education for All* of 1990. It is particularly relevant to the second goal of EFA which is to provide “access to basic education universally and completion of primary education by the year 2015” (WCEFA, 1990; also Colclough & Lewin, 1993: 11; UNESCO, 1993: 3), and the MDG goal which focuses on ensuring that all children have access to and complete a full course of primary schooling (United Nations Millennium Development Goals, 2000).

In view of the importance of basic education, the Nigerian government placed a premium on basic education by placing it in the centre of its educational policies. Since independence in 1960, the general guiding principle of education in Nigeria was to equip every citizen with the knowledge, skills, attitudes and values to give them the opportunity to derive the maximum benefit as members of the society (World Bank, 1998: 11). The process of making primary education universal, meaning that the programme is meant for everyone irrespective of class, race, culture, or tribe, started with former President Obasanjo’s military in 1976 (Tsafe, 2013: 3). For the first time in the history of Nigeria, the UPE programme, which originally started as a regional project, was redesigned by the national government to provide education for all Nigerian citizens by changing the content of UPE (Tsafe, 2013: 3). The UPE programme was, however, hampered by several problems such as the high rate of population growth, civil unrest and political changes, unstable education capacity, large numbers of out-of-school groups, disparities in the quality of education, limited resources, poor publicity and a lack of involvement of those concerned (Madugu, 2000: 68-77). This further informed the urgent need for a well-planned and comprehensive basic education programme to tackle these challenges.

Apart from the inherited problems of UPE, it was realised that it held many benefits for society as a whole. Examples include spill-over income benefits, increased occupational mobility, more lawful behaviour of citizens in general, and an increase in age at marriage (Aina, Akinotimi, & Olurem, 2010: 9-13). There was a general belief that the students who were the result of UPE did not have the required marketable skills and were not capable of steering the ship of human resources needed for economic development in the country (Obanya, 2000: 24-30). Okebukola (2005)

also shared the belief that primary schools failed in the task to develop literacy skills in pupils. The search for a way out of this predicament led the federal government of Nigeria to enact the *Universal Basic Education Policy* in 1999. This policy includes free and compulsory primary, junior secondary and nomadic education, and adult and non-formal education programs.

In addition Nigeria was a signatory to both the regional and international declaration and commitments for education and related areas such as the environment, social development, women and population development. Of particular interest is the Jomtien World Education Conference of 1990 which committed itself to the achievement of 100% enrolment and the provision of good quality primary education for all by the year 2015. In order to meet the mandate and targets of this declaration, the Nigerian government had to enact free and compulsory basic education.

3.3 A CRITICAL POLICY ANALYSIS OF THE UNIVERSAL BASIC EDUCATION POLICY (1999)

In this section the *Universal Basic Education Policy* (1999) will be analysed in terms of its context and content.

3.3.1 Context analysis

An analysis of context refers to the preceding circumstance and pressures leading to the formulation of a specific policy (Taylor *et al.*, 1997: 45). A context analysis can include factors such as historical, economic, social, and political factors which influence the inclusion of an issue in the policy. Additionally, related to these factors, is the influence of pressure groups and social movements which force governments to respond through the articulation of a policy statement. A context analysis subsequently considers the historical background of a policy, including past developments and initiatives upon which a policy is built. Such considerations of both the contemporary and historical contexts of a policy help to illuminate the 'why' and 'why now' questions we ask in critical policy analysis (Taylor *et al.*, 1997: 47). In this section, a context analysis of the *Universal Basic Education Policy* (1999) will include the historical context, the social context and the economic and political contexts.

3.3.1.1 Historical context

Whilst the UPE programme was free but not compulsory, it also did not achieve its overall goals in Nigeria (cf. 3.2.1). So although Nigeria had a vision to open access to education to everyone, it was with the *Jomtien Declaration of Education for All* in 1990 that the country confirmed its commitment to this vision by becoming a signatory to EFA. The outcome of this world conference on EFA in Thailand was the adoption of the declaration by all signatory countries. This was a bid to reduce the drop-out and illiteracy rates in every society (UNESCO, 2000: 38). In order to align itself with EFA, the *Universal Basic Education Policy* was launched by the Nigerian federal government on 30 September 1999 (Federal Ministry of Education, 1999b). This policy was seen as an expansion of the existing UBE in Nigeria, and took things further by making basic education free and compulsory. The latter also included the first three years of secondary education, which is junior secondary school. The enactment of the *Universal Basic Education Policy* in 1999 was subsequently in response to the 1990 *Jomtien Declaration on Education for All*.

3.3.1.2 Social context

As indicated previously, Nigeria is a multi-ethnic country with diverse cultural groups and indigenous languages with over 250 socio-linguistic groups (cf. 3.2.1). However, although English is the most common spoken language and the official language of instruction in the primary, secondary and higher levels of education (Ezewu, 1982: 74-76), Hausa, Ibo and Yoruba are recognised by the government as the three major languages. Language is very important, not just because it is a medium through which people communicate, but because it also plays a major role in cultural transmission (UNESCO, 2003: 30) and the integration of people. In view of the multi-ethnicity and diverse indigenous languages of Nigeria, it became necessary to develop and launch an educational policy which would make access and quality education available to all by means of enhancing the use of mother-tongue in the early stages of schooling. The latter is also important as the strength of the three major native languages listed above could easily weaken other minority languages and subsequently render access to quality basic education problematic.

In addition, the population report of 1998 indicates that Nigeria's population was about 112 million at that stage, which is far more than the 88 million population figure of the 1991 Nigerian population census (Nigeria National Bureau of Statistics, 1998). Population refers to the number of people in a geographical area determined by fertility rates, mortality rates and life expectancy. Nigeria's fertility rate in the 1990s was 6.0. The national fertility rate is an indicator that shows the potential for population change in the country, and in 1990 it was reported to be 6.0 (Index Mundi, 1990: 1). When considering the increase of the population from 1991 to 1998, it could be assumed that an increasing fertility rate since 1990 would have contributed to difficulties for families, such as to feed and educate their children. Whilst the fertility rate has an effect on the attainment of basic education, it also has a strong negative correlation with a woman's educational attainment. This state of affairs was worsened by the high maternal mortality rate and poor access of women to quality health care in Nigeria, particularly in rural areas where discriminatory practices and violence against women occurred (Adedoyin and Adegoke 1995: 27-31; Anumnu, 1995: 48-59; African Network for the Prevention and Protection against Child Abuse and Neglect (ANPPCAN) 1996). Whilst socio-cultural issues influence the population dynamics and pose a challenge to the attainment of basic education, it can be assumed that the number of people in a geographical place impacts on enrolment levels in education, on budget and finance considerations, and on infrastructure development (UNESCO, 2000: 1).

According to Okongwu (1984: 1), the unprecedented demographic shifts and reformations of populations all over the world, including transitions of world economy from agriculture and manufacture to information and technology to bio-genetics, have sent a message to all stakeholders regarding the importance of bringing change in the existing culture of managing free education programs. Within the Nigerian context, it became necessary to consider and launch the UBE policy in 1999 to open up access to a relevant foundation for the development of science and technology in the country. In addition, education is also viewed as a means to build a free, democratic, just and equalitarian society, a united strong and self-reliant nation, and a land of bright and full opportunities for all citizens (Federal Republic of Nigeria, 2004). By providing free and compulsory education to all Nigerians, the Nigerian

people could therefore be given the opportunity to gain access to education that aligns with that of developed nations.

Nigeria, in its struggle for independence, emphasised the widening of access to education and the diversification of educational opportunities. Whilst UPE was introduced in the mid-1970s and was followed by free education in 1979 (Aluede, 1999: 55), Nigeria continued to invest in education with various degrees of success. Nigeria as a nation has faced many challenges such as the rate of population growth, civil unrest and political changes, unstable education capacity, large numbers of out-of-school groups, uneven quality of education and limited resources to provide free good quality education for all (Denga, 2000: 1-6). This state of affairs advanced the urgent need for a well-planned and comprehensive basic education programme to tackle rising challenges.

3.3.1.3 Economic context

It has been indicated that basic education can be regarded as an investment with a significant contribution to economic growth (Obani, 1996: 5; World Bank, 1998: 11). It became necessary to consider economic issues such as poor governance, corruption, limited infrastructure and unemployment (Akinboyo, 1987: 404-411; Adebayo 1999: 81-102) in the development and implementation of basic education policies. Education, which can be regarded as both a consumption and an investment item in the economy, has great value because of its benefits which include the boosting of the economy, the reduction of poverty, and the fostering of peace. By implication, the distribution of educational investment will necessarily affect income distribution in the future (Madrid-Aris, 2000: 2).

Nigeria as a nation derives most of its revenue from crude oil which makes up over 90% of total exports and yields about 85% of government's revenue. The international oil market is unstable, however (Ekpo and Egwaikhide, 1994), and global instability in the crude oil market subsequently holds implications for the funding of basic education in Nigeria. Underfunding of educational programmes is likely to result in a poor educational outcome and by implication would likely affect the management of the economy. It is therefore important that the enactment of the

UBE policy ensures ample international partnerships to assist in cushioning the effect a possible dwindling economy might have on education.

According to the United Nations Development Programme (1990), the incidence of poverty in Nigeria was found to be high with many Nigerians living below the poverty line. A subsequent report showed that as a result of the poor performance of the economy, the incidence of poverty increased from 42.7% in 1992 to 65.6% in 1996. The poor economic status of the nation led to severe economic hardship and inequalities in the country where many children of school-going age were subjected to child labour to augment family income. Many of these children have subsequently been subjected to all forms of abuses (Famuyiwa, 1997: 336-338; Izuora & Ebigbo, 1985: 21-23; Ofordi, 1981: 94-98). As exposure to education increases human capital development through skills acquisition (Obani, 1996: 5), the adoption of the UBE policy became pertinent in making basic education both free and compulsory so as to give all children the opportunity to attend school, irrespective of their family, social and economic status. Whilst free and compulsory education would mean that families, especially poor families, would not have to pay school fees, buy uniforms and books, the Nigerian government was required to show commitment and provide effective leadership to implement free and compulsory education.

3.3.1.4 Political context

The importance of education to human beings cannot be overemphasised. Education is regarded as the quickest way through which poverty can be eradicated in a society. Basic education is a vital stage of education as it forms the bedrock upon which all other levels are built (cf. 3.2.1). In Nigeria several political dispensations have affected the basic levels of education. In fact, basic education in the country had passed through diverse phases, each influenced by the political era of the day. There is little doubt that the provision and management of basic education was greatly affected by this turbulence (Osokoya, 1989). Efforts were made during each dispensation to provide access to basic education. In 1977 the Federal Military Government enacted the "School Takeover Validation Decree" which strengthened the powers of the state government to take over all schools to ensure the effective implementation of the national programme on UPE that was launched in 1976. Whilst there was some remarkable progress, implementation, however, was

stunted with challenges such as inadequacy of policy resources, fragmentation and conflict of roles or responsibilities due to many agencies involved in the implementation, and a dearth of high quality personnel in the implementing agencies at state and local government levels (cf. Madugu, 2000: 68-77). Social, economic and political factors also played a role (cf. Madugu, 2000: 68-77). The provision of basic education, particularly at primary school level, became a major problem for successive governments to majority, and it was anticipated that the enactment of the UBE policy could provide greater stability in education in Nigeria.

In the preceding section I undertook a context analysis of the *Universal Basic Education policy* of 1999. By means of this analysis, it was established that although Nigeria is a culturally diverse country which places value on education, the enactment of this policy was preceded, but also necessitated, by issues of poor governance, a depressed economy and social inequalities. The overall implication brought about by these challenges has led the country to perform poorly in its delivery of all levels of education. It is within this reality that the UBE policy was enacted as a means to provide free and compulsory education to all Nigerians. In the next section a content analysis of the UBE policy will be undertaken.

3.3.2 Content analysis

Analysis of content involves the answering of the 'how' and 'what' questions of a policy (Taylor *et al.*, 1997: 49). The *how* of the policy relates to what the policy tells us while the *what* of the policy is applicable to the policy directives, in other words what should be done in order to implement the policy. When considering the how of a policy, various aspects of the policy need to be analysed. For example, in addition to unpacking the structure of the policy, it is also important to analyse the principles, objectives and priorities upon which a policy is built (Taylor *et al.*, 1997: 48). As policy is always concerned with reform and change, policy analysis can also be regarded as a value-laden activity that makes judgments as to whether and in what way policies help to make things better (Henry, 1993: 104). As a consequence, the analysis of the aim, objectives and the underpinning values and principles should always be considered in relation to reform and change. With regard to the *what* of the policy, the policy directives for implementation should be analysed in terms of the extent to which they align with the aim, objectives and principles of the policy.

In this following section, a content analysis of the *Universal Basic Education Policy* (1999) will be undertaken and the framework of my analysis will include the structure of the policy, its objectives, the underlying assumptions and values of the policy, and the policy directives.

3.3.2.1 Structure of the policy

The UBE policy is divided into four parts, namely Part I: *Free Compulsory Universal Basic Education Act*; Part II: *Establishment and Membership of the Universal Basic Education Commission*; Part III: *Financing of the Universal Basic Education*; and Part IV: *The Establishment of States Basic Education Board and Local Government* (Federal Republic of Nigeria (FRN), 2004). For the purpose of my research, I shall specifically focus on Parts I and III because they have a specific bearing on free and compulsory education.

Part I, which deals with the *Free Compulsory Universal Basic Education Act*, consists of six sections (Federal Ministry of Education (FMOE), 1999: Sections 1 – 6). Section 1 is titled *Federal Government intervention for uniform and qualitative basic education* and emphasises the role of government in providing quality basic education. By implication, this section refers to the responsibility of the government to enact the necessary legislation to ensure basic education, its facilitative role for the development of relevant curricula, the provision of infrastructural facilities, textbooks and instructional material for effective teaching and learning, and the training and retraining of teachers. In addition, Section 2 is concerned with the *Right of a child to compulsory, free universal basic education*. This section reaffirms the right of the child to acquire basic education, and coincides with Section 18(3) of the *Constitution of the Federal Republic of Nigeria* (1999):

Government shall strive to eradicate illiteracy; and to this end Government shall, as and when practicable, provide –

- (a) free, compulsory and universal primary education;*
- (b) free university education; and*
- (c) free adult literacy programmes.*

Section 3 clearly states that services in public primary and junior secondary schools are free of charge, while Section 4 highlights the duty of a parent to ensure the

education of his child. Section 4 also deals with the roles and responsibilities of parents with regard to their children's education, while Section 5 stipulates how Sections 2 and 3 are not applicable to children not resident in Nigeria. In the last instance, Section 6 deals with the jurisdiction of the Magistrates' Courts over certain offences and subsequently indicates how the judiciary will serve as a support base towards the actualisation of the policy by punishing offences related to the implementation of the UBE free and compulsory education policy.

Part III of the policy focuses on the integrative funding for UBE and gives an exposition of how the implementation shall be financed. In this regard, the policy indicates that finances will come from:

- a) a federal government block grant of not less than 2% of its consolidated revenue fund;*
- b) funds or contributions in the form of federal guaranteed credits; and*
- c) local and international donor grants (FMoE, 1999a: Section 11).*

In addition, in Section 11(2) it is stated that

For any State to qualify for the Federal Government block grant pursuant to sub-section (1) of this section, such State shall contribute not less than 50% of the total cost of projects as its commitment in the execution of the project (FMoE, 1999a: Section 11(2)).

From Part III of the policy it can be concluded that the financing of free and compulsory education is regarded as a collective responsibility of the federal government, the local government and other agencies. The provision of free and compulsory education is, however, an expensive social service and one could agree with Nwagwu (2002) that the public sector (the federal government, state governments and local governments), the private sector (companies and other firms) and the rest of the world (international agencies like UNESCO and other bilateral and multi-lateral arrangements for funding of educational activities) will have to remain committed in the funding of free and compulsory education. Whilst the Nigerian government is categorical on a wide range of participation by government and non-governmental bodies in financing education (Nakpodia, 2011), the successful implementation of UBE indeed remains dependent on adequate funding.

In Section 11(3) it is clearly stated that “[t]he services provided in public primary and junior secondary schools shall be free of charge”. Thus, any form of mandatory payment required from parents or guardians is in contravention of this section of the policy. The provision of free primary and junior secondary education is also underscored in Section 2(1) where it is stated that

Every Government in Nigeria shall provide free, compulsory and universal basic education for every child of primary and junior secondary school age (FMoE, 1999a: Section 2(1)).

Whilst the policy commits itself to the provision of free and compulsory education on primary and junior secondary level, it also commits itself towards the financing of free and compulsory education.

3.3.2.2 Objectives of the policy

In the document *Implementation Guidelines for the Universal Basic Education Programme* (1999b) the specific objectives of the programme are stipulated as:

- *developing in the entire citizenry a strong conscientiousness for education and a strong commitment to its vigorous promotion; provision of free universal basic education for every Nigerian child of school going age; reducing drastically the incidence of drop-outs from the formal school system; catering for young persons, their schooling as well as other out of school children and adolescents through appropriate forms of complementary approaches to the provision of UBE; ensuring the acquisition of appropriate levels of literacy, numeracy, manipulative communicative and life skills as well as the ethical, moral and civic values needed for laying a solid foundation for life-long learning (FMoE, 1999b: Section 1).*

When regarding the objectives, it is pertinent to first point out that the Nigerian variant of basic education is free and compulsory with the scope of accommodating every child, both those who need early childhood care and those who are of school-going age (FMoE, 1999a: Section 2(1)).

The first objective aims at creating an awareness in the hearts of citizens about the need for the acquisition of basic education. The implication for the government is that legislation must not only promote and protect basic education, but must make necessary aid and material required for its effective implementation available. It is anticipated that the development of “a strong conscientiousness for education and a strong commitment to its vigorous promotion” could be plausibly attained in the long run, and subsequently benefit all Nigerian people (Adepoju & Fabiyi, 2007: 2).

The second objective emphasises the need for the provision of basic education to all Nigerian children. This is in agreement with the right of the child to free compulsory universal basic education as stated in Section 2(1) of UBE policy. Whilst this stipulation aligns with Section (18)3 of the 1999 *Constitution of the Federal Republic of Nigeria*, it also implies the commitment required from the Nigerian government to ensure the provision of free and compulsory education to every citizen of school-going age in the country.

The third objective expresses the need to reduce the drop-out rate of learners in the school system. In the early 1990s, the period preceding the birth of the UBE policy, the drop-out rate at the end of the sixth year of primary school in Nigeria was between 28.5% and 39.7% among male students, and 28.4% to 41.3% among female students (UNESCO, 2000). Whilst this high drop-out rate may have been associated with the high cost of schooling, it is anticipated that an educational system which eliminates financial and other barriers to the acquisition of basic education (FMoE, 1999a: Section 3(1)) may indeed feed into the reduction of the drop-out rate. Furthermore, it could be argued that a reduction of drop-outs will ultimately contribute to citizens acquiring the relevant skills to become better individuals. Similarly, a very high completion rate of the school cycle as contained in the third objective, is likely to be achieved if an effective monitoring mechanism is established (Gabriel, 2012: 218).

The fourth objective lays emphasis on how to cater for the youth at school, but also for those persons who did not complete the school cycle at the opportune time. In order to actualise this objective, the government has to, *inter alia*, develop out-of-school programmes for updating the knowledge and skills of persons who left school before acquiring the basics needed for life-long learning (FMoE, 1999b: Section 1). This is

also in consonant with the fifth and sixth goals of the Jomtien Declaration (WCEFA, 1990) which refer to the expansion of basic education and training and increased acquisition of knowledge, skills and values, respectively.

The fifth objective points to the quality of education that would make the individual functional and provide a solid background for future informal, formal and non-formal education, including life-long learning. Whilst this objective aims to reduce the illiteracy rate, it is also aimed at improving numeracy, manipulative, communicative and life skills. It is anticipated that this objective will be achieved through the acquisition of basic adult literacy and numeracy, health education programmes, gender awareness, women empowerment, agriculture improvement skills, civil education, and income generating management skills to address poverty (FMoE, 1999b:Section1; WCEFA, 1990; Mathew, 1999: 1).

The objectives of the *Universal Basic Education Programme* seem to indeed be in tandem with the EFA's goal to provide "access to basic education universally and completion of primary education by the year 2015" (WCEFA, 1990; also Colclough & Lewin, 1993: 11; UNESCO, 1993: 3). Whilst these objectives coincide with Section (18)3 of the 1999 *Constitution of the Federal Republic of Nigeria* which underscores the right of the child to basic education, they also highlight the Nigerian government's commitment to ensuring free and compulsory education. Whilst it can be assumed that the government must ensure that instructional materials and teaching aids are readily available in the schools for effective teaching and learning, other stakeholders must also be involved in the achievement of the UBE programme (FMoE, 1999b: Section 35-36; Gabriel, 2012: 219).

Having listed and explained the objectives of the policy, the underlining assumptions and values of the policy will now be analysed.

3.3.2.3 Assumptions and values underpinning the policy

According to Taylor *et al.* (1997: 49), the assumptions underlying a policy is an important aspect of policy content analysis because they usually underpin a policy as the *silences* in the policy. Hence, the analysis of these *silences* can reveal the "mind" of a policy and also the dominant ideology informing the policy. Three

important assumptions have been identified in the UBE policy, namely the assumed right of the child to education, the assumed ability of parents to take responsibility for the schooling of their child(ren), and the assumed ability of the government to promote and protect free and compulsory education.

Firstly, it is assumed that every child has the right to have basic education. The right of the child is clearly stated in Section 2(1) of the policy as it emphasises the responsibility of the Nigerian government to see to this right by providing free, compulsory and universal basic education. The confirmation of this basic right is also expressed in Section 18(3) of the 1999 *Constitution of the Federal Republic of Nigeria*. In this document it is indicated that the government shall strive to eradicate illiteracy and make free, compulsory universal basic education available. In addition to this assumed basic right, it is further assumed that the government will be able to provide for basic education and subsequently enact enabling laws to actualise free and compulsory basic education.

Secondly, it is also assumed that the parent is responsible for his/her child to acquire basic education, as pointed out in Section 2(2):

Every parent shall ensure that his child or ward attends and completes his
(a) primary school education; and
(b) junior secondary school education, by endeavouring to send the child
to primary and junior secondary schools.

It is subsequently further assumed that the parent will necessarily be able and capable to ensure that the child acquires basic education. However, in Section 2 (3 and 4) the policy elaborates on how the “stakeholders in education in a Local Government Area shall ensure that every parent or person who has care and custody of a child performs the duty imposed on him”. This will be further discussed in 3.4.1.5 of this chapter.

Thirdly, the policy assumes that the government is able to pay for the education of its citizens. Section 3 (1 and 2) states that

- 1) *The services provided in public primary and junior secondary schools are free of charge.*
- 2) *A person who receives or obtains any fee contrary to the provisions of subsection (1) of this section commits an offence and is liable on conviction to a fine not exceeding N10, 000.00 or imprisonment for a term of three months or to both’.*

While this is in agreement with Section (18)3 of the *1999 Constitution of the Federal Republic of Nigeria*, it also aligns with the goals of the *Jomtien Declaration* on EFA (cf. WCEFA, 1990).

In addition to the mentioned assumptions, two values are clearly emphasised in the policy, namely the right of the child to free and compulsory education, and equality in accessing basic education.

a. Right of the child to free, compulsory and universal basic education

As education is regarded as a human right that should be accorded to all human beings, this right should be valued by a government who is serious about the education of its citizens (Igbuzor, 2006: 4; Myteberi, 2011). Obani (1996: 5) also expresses that education improves the development of any society, leading to a strong nation, and therefore education can be seen as the best legacy a country can give to its citizens.

The right of the child to free, compulsory basic education is stated in Section 2 of the UBE policy, and with respect to this the Nigerian government launched the UBE programme in 1999 to ensure that every citizen acquires basic education. The duties of stakeholders in education in the local government are spelt out in Section 2(3), whilst the punishment for any parent who contravenes Section 2(2) is also indicated (FMoE, 1999a: Section 2(1, 2, 3 and 4)).

As stated earlier, the acknowledgement of the legal right of every Nigerian child to basic education is also in line with Section 18(1) and (3) of the *1999 Constitution of the Federal Republic of Nigeria*. The latter emphasises the need for the government to make policies that guarantee equal educational opportunities and provide free, compulsory basic education. This further serves to strengthen free and compulsory

basic education in Nigeria and underscores the responsibility of the government to ensure that there shall be no discrimination against any child from regarding the acquisition of basic education. In this regard, Section 18(1-3) of the *Constitution of the Federal Republic of Nigeria* (1999) stipulates that “government shall direct its policy towards ensuring that there are equal and adequate educational opportunities at all levels”.

The acknowledgement of the child’s right to basic education should also be read against the fact that Nigeria is a signatory of the Jomtien Declaration on Education for All (1990). In Article 1 of the declaration it is stipulated that “every person – child, youth and adult – shall be able to benefit from educational opportunities designed to meet their basic needs”. Similarly, the MDGs adopted in September 2000 at the United Nations Millennium Declaration, have two of their eight goals devoted to education. While Goal 2 refers to the achievement of universal primary education, Goal 3 deals with the promotion of gender equality and the empowerment of women (cf. WCEFA, 1990; also Colclough & Lewin, 1993: 11; UNESCO, 1993: 3).

The implication of the above for schools in Nigeria is that they must be willing to admit every child who is of school age. As it is the right of the child to receive free and compulsory universal education, it is subsequently expected that schools will address hindrances to students’ enrolment in schools. In addition, however, schools must also be prepared for an increase in enrolment and the possibility of the overstretching of basic facilities. In order to promote the right of the child to basic education, an increase in staff strength, including the training and re-training of teachers, will also be required. In addition to the policy on paper, various increasing demands can be anticipated in order to provide free and compulsory basic education on an ongoing basis in Nigeria.

b. Equality in accessing basic education

Equality is regarded as a value because it means that every citizen has the same opportunity to take part in the spiritual, social, physical, economic and political life of the country (Paul, 2007: 31). However, in order to realise this, all citizens, irrespective of gender, tribe and family economic status, must enjoy an equal opportunity in accessing basic education. As a consequence, the UBE policy

(FMOE, 1999a: Section 2(1)) underscores that every child of primary and junior secondary school age shall be provided free, compulsory and universal basic education by the Nigerian government. As the provision of basic education is subsequently anticipated in the policy document, purposeful steps need to be taken to identify those groups that are marginalised and excluded from equality of access. Such an attempt to redress inequalities also concurs with Goal 3 of the MDG that is specifically aimed at promoting gender equality and the empowerment of women (United Nations Millennium Development Goals, 2000). When bearing this in mind, it seems that the government is indeed committed to the realisation of equality in education, thus in the opening of the doors to free and compulsory education.

3.3.2.4 Policy implications

Policy implications involve the policy directives, i.e. steps stipulated in the policy with the aim of policy implementation. Thus, as per policy directives in the document, attention will be given in this section to

- service in public primary and junior secondary schools as free of charge;
- the financing and provision of free, compulsory universal basic education; and
- the role and duty of parents to ensure the realisation of the right to education.

a. Service in public primary and junior secondary schools are free of charge

In Section 3 (1 and 2) of the Nigerian UBE policy, it is clearly stated that all services provided in public primary and junior secondary schools are free of charge:

A person who receives or obtains any fee contrary to the provisions of subsection (1) of this Section commits an offence and is liable on conviction to a fine not exceeding N10, 000.00 or imprisonment for a term of three months or to both.

This is in agreement with the 1999 *Constitution of the Federal Republic of Nigeria* Section 18(3) which elaborates on the need for the government to provide universal basic education. The foregoing implies that in all Nigerian primary and junior secondary schools services should be rendered to learners free of charge. The school heads/principals are not expected to demand any fee from learners or their parents, as such an action will contravene Section 3 of the policy. The role of the

magistrate's court is also significant in the realisation of the provision of free and compulsory education:

The magistrate's court or any other State Court of competent jurisdiction shall have jurisdiction to hear and determine cases arising under Section 2 of this Act which talks about the right of the child to free, compulsory universal basic education and to impose the punishment specified (FMOE, 1999a: Section 6).

In sum, if the policy stipulates that education is free, it is assumed that the Nigerian economy is strong enough to support free education. Whilst the government commits itself to the provision of free and compulsory basic education, it also envisages its own commitment to provide all the necessary materials required for teaching and learning.

b. The financing and provision of free, compulsory, universal basic education

Whilst the policy alludes to the provision of free and compulsory education (Section 2(1)), it also stipulates how the financial side of education provision will be taken care of:

- (1) *The implementation of the UBE shall be financed from:*
 - (a) *a federal government block grant of not less than 2% of its consolidated revenue fund;*
 - (b) *)funds or contributions in the form of federal guaranteed credits; and*
 - (c) *local and international donor grants*
- (2) *For any state to qualify for the Federal Government block grant pursuant to subsection (1) of this section, such a state shall contribute not less than 50% of the total cost of projects as its commitment in the execution of the project. (3) The administration and disbursement of funds shall be through the State UBE Board (FMoE, 1999a: Section 11).*

The policy subsequently regards the financing of free and compulsory education as the collective responsibility of all tiers of government, including non-governmental agencies. Education for All really is the business of All (FMoE, 1999b: Section 31).

As the provision of free and compulsory education is an expensive social service, involvement from various sectors is required. The latter involves both intra and inter-sectoral collaboration and national and international cooperation in funding, such as the federal, state, and local government revenue from the Education Tax Fund, as well as contributions from other sources like NGOs, the private sector, the civil society and multilateral agencies (FMoE, 1999b: Section 31). The UBE programme shall therefore be financed by the government through budgetary allocation, block grants and donor grants. By implication the government will have to mobilise sufficient funds from various sources for the realisation of the UBE objectives, while also targeting available funds for areas such as, inter alia, school buildings, equipment, textbooks, payment of teachers' salary, and training (FMoE, 1999b: Section 29). It is also implied that appropriate legislation on adequate funding of basic education is essential and should be enacted. Conclusively, while government realises its role as the major provider of finances for UBE, it is also expected to ensure that the Millennium Development Goals (MDG) regarding free and compulsory education are met by the year 2015.

In addition to providing the necessary funding for the provision of free basic education, the government must also take the necessary measures to remove possible barriers to education. These barriers could include cultural barriers but also violence and abuse in the school environment (UNICEF, 2007: 39). This implies that adequate public enlightenment and social mobilisation with appropriately targeted messages have to be carried out across the federation, bearing in mind the socio-cultural dimensions of the Nigerian society (FMoE, 1999b: Section 10). It also implies the requirement of the necessary legislation to curb violence and abuse in the school environment, including cultural barriers to education.

c. Role and duty of parents to ensure the realisation of the right to education

The role of parents in the realisation of the child's right to basic education is an indispensable aspect embedded in the UBE policy of Nigeria. The policy subsequently acknowledges the critical role of parents in the schooling of their children, including the yielding of meaningful and significant results. Partnering with parents is seen as critical in achieving the objectives of the UBE policy (cf. 3.4.1.3).

In this regard, the policy is very clear on the duty of parents with regard to the education of their children. In Section 4(1) it is stipulated that

every parent shall ensure that his child receives full-time education suitable to his age, ability and aptitude by regular attendance at school.

As such, the policy places a moral burden on parents as it leaves them with the responsibility of ensuring that their children receive the education that is due to them.

The responsibility is further reiterated by Section 2(4) that stipulates that

A parent who contravenes Section 2(2) commits an offence and is liable to –

- (a) First conviction, to be reprimanded;*
- (b) Second conviction, to a fine of N2, 000.00 or imprisonment for a term of one month or both;*
- (c) On subsequent conviction, to a fine of N5, 000.00 or imprisonment for a term of two months or both.*

In line with Section 4(1), parents must therefore ensure that all children in the family attend and complete their primary and junior secondary school education. As mentioned, parents are considered responsible for the school education of their children, but are also held accountable by the government in this regard. Section 2(2) therefore alludes to penalties regarding contravention on the part of the parents. In conclusion, my analysis of the *Universal Basic Education Policy* (1999) included both a context analysis and a content analysis. The context analysis included an exposition of the historical, economic, social and political factors that led to the gestation of the policy (3.3.1.1 - 3.3.1.4). In order to answer the *how* and the *what* questions of the policy, I looked at the structure of the policy, the objectives of the policy, the underlying assumptions and values, and the policy directives (3.4.1.1 – 3.4.1.4). The insights gained from this analysis will, along with the analysis of the *Rivers State Universal Basic Education Law* (2005), be used in the compilation of the questionnaires to be used in the next chapter.

3.4 A CRITICAL POLICY ANALYSIS OF THE RIVERS STATE UNIVERSAL BASIC EDUCATION LAW (2005)

In this section of my study, I will analyse the context and content of the Rivers State Universal Basic Education Law (2005) (hereafter the Rivers State UBE Law).

3.4.1 Context analysis

Context analysis, as stated in 3.3.1, refers to the preceding circumstances and pressures that lead to the formulation of a specific policy. As such, the economic, social, and political factors that led to the gestation of the policy will receive attention. By implication the context analysis will also involve the historical background of the policy, including past developments and initiatives upon which the policy is built. In this section, the context analysis of the Rivers State UBE Law will include the historical, social, economic and political contexts that led to the issue of universal basic education being placed on the policy agenda.

3.4.1.1 Historical context

Rivers State is one of the 36 states of the Federal Republic of Nigeria and was initially part of the political eastern Nigeria until its formation on 27 May 1967 (Salawu 1993; Nation Bureau of Static, 2014). The state consists of 23 local government areas (cf. figure 2) and Port Harcourt is the capital. The Rivers State UBE Law is aimed at providing free and compulsory universal basic education for all children of primary and junior secondary school age in Rivers State (Rivers State Ministry of Education (RSMoE) 2005: Section 1). The law was enacted by the Rivers State House of Assembly in 2005 as an offshoot of the *Universal Basic Education Act 2004* of Nigeria. The objectives and values of the Rivers State UBE Law are the same as that of the UBE Act. As this particular study was carried out in the Rivers State, I find it imperative to do an analysis of this particular law.

The concept of universal education in the Rivers State dates back to 1957 when the eastern Nigerian government launched the UPE programme for the region (Taiwo, 1980: 174). At the inception of the UPE scheme, the Rivers State did not exist, and as a consequence UPE was undertaken by the eastern regional government (Taiwo, 1980: 174). While UPE resulted in various inequalities in basic education delivery within the region, the Rivers State was, after its formation, classified as one of the educationally less-privileged states. As a consequence the UPE programme was implemented in the Rivers State, but it was not made compulsory, even though education was free (Aluede, 1999: 97-98). In 2005 the Rivers State UBE programme was launched and enacted into law, although in consonant with the Nigerian UBE

programme which was introduced in 1999 by the federal government. Basic education was now made free and compulsory (RSMoE, 2005: Section 1).

Against this historical setting, various factors contributed to different educational development patterns across the Rivers State and at the local government level (LGA). In the next section, attention will be given to the factors that led to the gestation of the Rivers State UBE Law in 2005.

3.4.1.2 Social context

The Rivers State consists of diverse ethnic groups, including, *inter alia*, Ikwerre, Ogoni, Ijaw, Kalabari, Ogba, Etche, Abua, Andoni, Ekpeye, Engenni and Okrika (Nation Bureau of Static, 2014). Because of the diverse ethnic groups in the state, it became necessary to launch an educational policy to emphasise the place of mother-tongue language in teaching and learning during the early stage of schooling. Through this all students would have access to quality education, irrespective of their race, tribe or native language. The work by Oyetade (2003: 105-117) indicates the importance of mother-tongue education as a productive tool in teaching and learning during the early stages of schooling in a multi-lingual environment.

Furthermore, Rivers State experienced population growth in the 1990s (Nigeria National Bureau of Statistics, 2003). In 1991 the population was 3,187,864 (National Population Commission of Nigeria, 1991). This high growth rate holds certain implication for the education system. In particular, an increase in the enrolment of students will impact on the acquisition of basic education as it creates an increasing demand for resources. For instance, the provision of classrooms and basic instructional materials are affected and could easily lead to creating inequalities in access to quality basic education. A system of education which would address these inequalities and give access to quality basic education in the Rivers State subsequently became necessary.

The 1999 *Constitution of the Federal Republic of Nigeria* prohibits discrimination on the grounds of gender, but there are customary and religious laws in Nigeria which continue to restrict women's rights (Convention on Elimination of discrimination Against Women (CEDAW), 2003). Nigeria is a federal republic and each state has

some autonomy in making its own legislation. The combination of federation and a tripartite system of civil, customary and religious law makes it very difficult to harmonise legislation and remove discriminatory measures (CEDAW, 2003). In the Rivers State, some cultural practices in some tribes deny children, particularly female children, to access basic education. This practice is not in line with the vision defined in the *Jomtien Declaration on Education For All* of 1990. Adherence to these cultural practices reinforces customs that are unfavourable to women, including those relating to freedom of movement, to marriage and to education. It therefore became necessary to enact state-based laws to enhance access to basic education by eradicating discriminatory practices against females.

3.4.1.3 Economic context

Rivers State is the hub of the hydrocarbon industry in sub-Saharan Africa and home to 60% of the total foreign investments in the southern region of Nigeria. It also hosts Nigeria's largest accumulation of multinational oil corporations including Shell, Agip, Total, Mobil and Chevron (*Online Nigeria*, 2003: 1). In view of this, there was a need to develop basic education that can ultimately serve as a platform for further specialist training to meet the increasing persons' power needs posed by the growing oil and gas industry in Rivers State.

Furthermore, the growing oil and gas industry in Rivers State have also posed a distraction to some young people as they abandon basic education to do menial jobs in the multinational oil companies who are also in need of such low cadre staff. This undermines human development in the Rivers State (Enyia, 1991; Ikein, 1991). It subsequently became critically important to make basic education not just free, but also compulsory for all children in Rivers State.

3.4.1.4 Political context

From the period preceding the creation of Rivers State to the post-1967 era, there were many inequalities in the delivery of basic education which negatively impacted on the Rivers State people (Taiwo 1980: 174). In 1976 a national UPE programme was introduced, and in 1977 the Federal Military Government enacted the *School Takeover Validation Decree* of 1977 which strengthened the powers of the state

government to take over all schools to ensure the effective implementation of the 1976 national programme on UPE. This failed across the country, however, including in the Rivers State (Denga, 2000: 1-6). Subsequently in 2005 the then democratically elected government of Rivers State introduced the UBE programme to give the children of Rivers State equitable and quality access to basic education (RSMoE, 2005: Section 1).

Framed as against the background of the context of the *Rivers State UBE Law of 2005*, a content analysis will now be undertaken.

3.4.2 Content analysis

A content analysis involves answering both the 'how' and 'what' questions of the policy. In the subsequent analysis, attention will be given to the structure of the Rivers State UBE Law, the objectives, assumptions and values of the policy and the policy directives.

3.4.2.1 Structure of the Rivers State UBE Law

The structure of the Rivers State UBE law is a reflection of the Nigerian UBE policy as it has a direct bearing on the national policy. The document is divided into three parts, namely Part I: *Provision of Free Compulsory Universal Basic Education*, Part II: *Establishment of Rivers State UBE Board and Local Government Education Authority*, and Part III: *Establishment, Composition and Functions of the Local Government Education Authority*. For the purpose of this study, attention will be given to Parts I and II as they place specific emphasis on free and compulsory education.

Part 1: *Provision of Free Compulsory Universal Basic Education*, consists of thirteen sections, but I will focus on Sections 1, 5, 6, 8 and 11. In Section 1 it is indicated that "[e]very child of primary and junior secondary school age in Rivers State is provided Free Compulsory Universal Basic Education". This section is in line with Section 18(3) of the 1999 *Constitution of the Federal Republic of Nigeria* which affirms that government shall provide free, compulsory universal education. It is further indicated in subsection (3) that free universal basic education is compulsory "for a period of 9

years” and that it comprises “(i) a 6 year primary education and (ii) a 3 year junior secondary school education”.

Sections 5, 6 and 8 emphasise the role of the parents in the education of the child. Section 5 refers to the responsibility of the parent to “ensure that his or her child attends and completes: (a) Primary education; and (b) Junior secondary school education, by endeavouring to send the child to primary and junior secondary schools”. This section also co-insides with Section 6 which places the emphasis on the responsibility of the parent to register a child and to ensure regular attendance. Section 8 highlights the penalties a parent or guardian can incur when contravening Sections 5 and 6. These sections are also in tandem with Section 4 of the Nigerian UBE Policy which states that every parent shall ensure that his child attends and completes primary and junior secondary education and Section 6 which states that magistrates’ courts shall impose punishment on anyone who contravenes the law. In Section 11(1) it is clearly stated that the services provided in primary and junior secondary school are free.

Part II of this policy deals with the *Establishment of Rivers State UBE Board and Local Government Education Authority*. As a consequence, this part places great emphasis on funding of the UBE programme in Nigeria, thus, including in the Rivers State. It however derives its strength from the Nigerian UBE policy. In Section 18 a fairly encompassing exposition is given of how the financing of free and compulsory education is the responsibility of both the federal, state and local governments. These three tiers of government are by implication responsible for the running of UBE in the Rivers State and are held responsible if funds are not made available or disbursed for the effective implementation of the Rivers State UBE Law in the state. They are therefore expected to articulate enabling policies, mobilise sufficient funds from various sources, provide funds for the education sector, and effectively co-ordinate activities in schools for effective implementation of UBE in Rivers State (FMoE, 1999b: Section 29).

3.4.2.2 Objectives of the Rivers State UBE Law

The objectives of the Rivers State UBE law are the same as that of the Nigerian UBE policy (1999). Before considering the objectives, it is important to note that the

Rivers State is committed to providing free and compulsory education its inhabitants and this is underscored in Part I, Section 1, which states that every child in the Rivers State will be provided with free, compulsory universal basic education (RSMoE, 2005: Section 1). The objectives should therefore be read in conjunction with this commitment.

Whilst the first objective is aimed at “[d]eveloping in the entire citizenry a strong conscientiousness for education and a strong commitment to its vigorous promotion” (RSMoE, 2005: Section 1), the second objective reiterates that every Nigerian child of school-going age will be provided with free universal basic education. This objective is in accordance with the right of the child as stipulated in Section 2(1) of the Nigerian UBE policy. It is also in agreement with Section 18(3) of the 1999 *Constitution of the Federal Republic of Nigeria* which states that government shall eradicate illiteracy and provide free and compulsory education. Similar to the objective in the Nigerian UBE Policy, the third objective points out the need to reduce the drop-out rate of learners. The fourth objective emphasises how to cater for youths could not finish their schooling. While it has been indicated that the government should introduce out-of-school programmes in order to enable these students to acquire the relevant skills needed for life (FMoE, 1999b: Section 1), this objective is also in tandem with the fifth and sixth goals of EFA. These goals emphasise the expansion of basic education and increased acquisition of knowledge, skills and values (WCEFA, 1990). The fifth objective points to qualitative education that would make the individual functional and would provide a solid background for future education (informal, formal and non-formal), in other words is life-long learning (Gabriel, 2012: 218). To realise this, the government should encourage the acquisition of basic adult literacy and numeracy, health education programmes, gender awareness, women empowerment and income-generating skills to redress poverty (FMoE, 1999b: Section 1).

As mentioned, the objectives of the Rivers State UBE Law are similar to those in the national UBE policy, and also in agreement with the EFA’s goal “to provide access to basic education universally and completion of primary education by the year 2015” (WCEFA, 1990; UNESCO, 1993:3). In addition, the objectives are also in accordance with right of the child as stipulated in the Nigerian UBE policy which is, in

turn, aligned with the stipulation that “government shall strive to eradicate illiteracy, and provide free and compulsory education”.

3.4.2.3 Assumptions and values of the Rivers State UBE Law

In the Rivers State UBE Law three important assumptions have been identified, namely the assumed right of the child to education, the assumed ability of parents to take responsibility for their children’s schooling, and the assumed ability of government to promote and protect free and compulsory education. These assumptions are the same as those identified in the UBE policy (3.4.1.4).

The first assumption is that it is the right of the child to have a basic education. According to Section 1(1) of the Rivers State UBE law, “[e]very child of Primary and Junior Secondary school age in Rivers State is provided Free Compulsory Universal Basic Education”. While this stipulation is in line with Section 2(1) of the Nigerian UBE policy, it also underscores Section 18(3) of the *1999 Constitution of the Federal Republic of Nigeria* which states that the government will strive to eradicate illiteracy and make free, compulsory universal basic education available.

The second assumption is related to the role of parents which is detailed in Section 5. Similar to the UBE policy, the Rivers State UBE Law (2005: Section 5) indicates that every parent has to ensure that his/her child attends both primary and junior secondary school. It is assumed that parents will take up this responsibility as it is referred to them in the policy document. The stipulation with regard to parents’ role and the concomitant assumptions are the same as indicated in the Nigerian UBE policy (FMoE, 1999a: Section 4).

The third assumption relates to Section 11(1) which states that the services provided in the primary and junior secondary schools are free. The underlying assumption here is that it is assumed that the Rivers State government has sufficient funds to provide free and compulsory education on the levels of primary and junior secondary education for all pupils. This is in accordance with Section 18 (3) of the 1999 Constitution of the Federal Republic of Nigeria and also aligns with the goals as defined at *Jomtien Declaration on Education For All* which is to provide access to

basic education universally, and completion of primary education by the year 2015 (cf. WCEFA, 1990).

In addition to the assumptions discussed, two values seem to be embedded in the Rivers State UBE Law, namely the right of the child to free and compulsory education, and equality in accessing basic education.

a. Right of the child to free, compulsory universal basic education

According to Section 1(1) of the Rivers State UBE law, free compulsory universal basic education is the right of every child. As mentioned earlier, the stipulation of the right of the child to primary and junior secondary education is also in agreement with Section 2(1) of the Nigerian UBE policy which stipulates that every government in Nigeria, and therefore including that of the Rivers State, shall provide free, compulsory and universal basic education to all children. As a consequence this right is not only valued by the Federal Republic of Nigeria, but the Rivers State is also bound to respect and value it. By implication there will therefore be no discrimination against any child's right to free and compulsory basic education as that will be a contravention of Section 18 of the 1999 *Constitution of the Federal Republic of Nigeria*. By implication schools in the Rivers State will have to manage massive enrolment figures and the utilization of resources. In addition, just like all schools in the other states in Nigeria, the Rivers State will have to ensure that every possible barrier to education is removed. They should also adopt a curriculum that meets the needs of all children and get the parents involved to support their children's education. (UNICEF, 2007: 39). It is anticipated that valuing and respecting the right of the child to basic education, and by ensuring that this right is protected and promoted, would contribute to the realisation of the goals of EFA according to which basic education must be free and compulsory.

b. Equality in accessing basic education

Equality is regarded as a value because it gives every child an equal right to attend school (UNICEF, 2007: 31). Although making schools accessible and available is an important first step in fulfilling the right to education, equal access to education can only be achieved if barriers in the community and in schools are removed (UNICEF,

2007: 31). Equality as a value is clearly underscored in Section 1 of the Rivers State UBE Law (2005) which states that every child of primary and junior secondary school age shall be provided free, compulsory universal basic education.

In order to achieve equal access to education in the Rivers State, the government should avoid actions that can prevent children from having equal access to education. For example, legislation which disqualifies certain groups of children from education should be avoided. Attempts should be made to redress past inequalities, and the government must be committed to making quality basic education accessible to all. This is also in tandem with the second goal of EFA which relates to the achievement of universal primary education (cf. WCEFA, 1990; UNESCO, 1993: 3).

3.4.2.4 Policy implications

Policy implications refer to the policy directives, i.e. the necessary steps to take in order to implement the policy. In this section, three directives will be discussed, namely

- provision of free services in primary and junior secondary schools;
- the duty of parents to ensure the education of their children and
- the financing of free and compulsory universal basic education in the Rivers State.

a. The services provided in primary and junior secondary schools are free

As stipulated in Section 11(1), the services provided in primary and junior secondary school are free and if any person contravenes this he “commits an offence and is liable to imprisonment of 3 months and a fine of N10,000” (RSMoE, 2005: 11). This service may include but is not only limited to free admission and enrolment, and also study materials such as books and study desks (FMoE, 1999b: Section 4).

The provisioning of free services is aligned with Section 3(10)(2) of the Nigerian UBE policy. In addition, this stipulation is also in tandem with Section 18(3) of the 1999 *Constitution of the Federal Republic of Nigeria* which highlights the need for government to provide free, compulsory universal basic education. By implication, primary and junior secondary school education in the Rivers State should

subsequently be rendered free of charge and anyone who contravenes this, shall also be liable to punishment.

b. Duty of parents to ensure the education of his child

The role of parents in the realisation of the education of their child cannot be stressed enough as they play an important role in the actualisation of their children's education. As stated in 3.6.1.3 in the Rivers State UBE Law, it is the responsibility of parents or guardians to ensure that children are registered and attend and complete their schooling. These duties are stipulated in Sections 5 and 6 of the River State UBE Law. In Section 8 it is clearly stipulated that “[a]ny parent or guardian who contravenes section 5 or 6 of this law commits an offence and is liable” to various forms of penalties, including the possibility of imprisonment. Once again, the Rivers State UBE Law aligns with the stipulations exposed in Sections 2 in the Nigerian UBE policy regarding the roles of parents and guardians.

c. The financing of free, compulsory universal basic education in the Rivers State

The financing of free and compulsory basic education in the Rivers State of Nigeria is the combined responsibility of the three-tier of government with a larger percentage coming from the state government (FMoE, 1999b Section 33). However, the financing of basic education in the Rivers States UBE Law is clearly stipulated in Section 18(1) where it is indicated that the funding of the board consists of money appropriated by the House of Assembly, the local government legislative council, the federal government block grant and the contribution made by the state. Technical directives regarding funding and the handling thereof are also included in Section 18.

In order for the Rivers State to get funds from the federal government, it has to comply with Section 2(1) of the Nigerian UBE policy which states that “[f]or any state to qualify for the federal government block grant pursuant to subsection (1) of this section, such a state shall contribute not less than 50% of the total cost of projects as its commitment in the execution of the project”. Thus, as with all other states, the government at federal, state and local levels are collectively joined to finance free and compulsory basic education in the Rivers State.

Additionally and in order to implement the Rivers State UBE Law, the government should adopt an approach that will lay the foundation for life-long learning. The curriculum must be reviewed to make it more responsive to the demands of UBE in the Rivers State (FMoE, 1999b: Section 22). Other areas of consideration with the aim of implementation include the need for the improvement of teachers' status as well as the education, training, professional development and motivation of teachers (FMoE, 1999b: Section 18). Furthermore, the enactment of legislation, sensitisation and mobilisation of target groups and all stakeholders in the state (FMoE, 1999b: Section 5) is important. There should also be adequate planning, optimal allocation and efficient utilisation of resources, including supervision and monitoring of the programme in the state.

3.5 CONCLUSION

In this chapter, the contextual issues that led to the adoption of the Nigerian UBE policy in 1999 and the Rivers State UBE Law in 2005 were discussed. Emphasis was placed on the historical, political, social and economic factors that assisted in the placing of free and compulsory universal education on the policy agenda. In the analysis of the two policy documents, attention was given to the structure of the policies, their objectives, the underpinning assumptions and the values of the policy, and lastly also the policy directives as exposed by the two documents.

The aim of the analysis of the two policies was to gain a better understanding of the issue of free and compulsory education from a policy perspective. In addition, I also worked with the contention that such an understanding will be helpful in compiling questionnaires and constructing interview questions to explore the consequences of the extent of implementation of free and compulsory education. In the next chapter, the extent to which the free and compulsory policy is implemented will be determined.

CHAPTER 4: THE EXTENT TO WHICH THE FREE AND COMPULSORY UBE POLICY IS IMPLEMENTED IN A SELECTION OF NIGERIAN SCHOOLS

4.1 INTRODUCTION

In the previous chapter, the *Universal Basic Education Policy* (1999) and the *Rivers State Universal Basic Education Law* (2005) were analysed in context and in content. In order for Nigeria (which is one of the countries that signed the Jomtien Declaration) to align itself with EFA, the *Universal Basic Education Policy* was launched on 30 September 1999 (Federal Ministry of Education, 1999b), thereby committing themselves to reducing illiteracy rates in the society. For this to be achieved, the government declared education free and compulsory for all its people. A content analysis of the *Universal Basic Education Policy* (1999) was undertaken within the framework of the policy structure, its objectives, the underlying assumptions and values of the policy, and the policy directives.

There has been a general feeling of scepticism about the successful realisation of the objectives of the free and compulsory UBE policy considering what researchers regard as poor preparations for its implementation (Adeyemi, 2007; Aluede, 2006; Obanyan, 2002). Numerous challenges such as non-availability of infrastructure, information and communication technology resources, poor funding, an inadequate level of teacher preparation and availability, lack of teacher continued education and professional development, gender inequalities in enrolment, and management problems have been elucidated in the literature as possible limitations to successful UBE implementation in Nigeria (Aduwa-Ogieghan, 2006; Ayo 2002; Hinchliffe 2002; Okecha 2008; Olaniyan & Olabanji 2008; Rankin & Aytac, 2006; UNESCO 2004). In order to finally comment on the extent to which the policy has been implemented, I had to establish what the realities are regarding the implementation is. In this chapter I examine the extent to which the UBE policy has been implemented in a selection of Nigerian schools by means of a survey.

The chapter begins with a discussion on the survey, and thereafter will be followed by a report of the analysis of the results.

4.2 RESEARCH METHODOLOGY

According to Winberg (1997: 14) research methodology is “the collective set of attitudes, values, beliefs, procedures and techniques that create a framework of understanding through which theoretical explanations are formed”. In line with the transformative paradigm (cf. Mertens, 2005:17) I agree that action for reform should be included in the agenda, with respect to the extent to which the UBE policy is implemented in Nigerian schools. Action for reform should subsequently bring about change in the lives of the participants in this research. The extent to which the UBE policy has been implemented is paramount as it impacts on the lives of participants, either positively or negatively.

4.2.1 Quantitative approach

In quantitative research the researcher decides what to study, asks specific, narrow questions, collects quantifiable data from participants, analyses the data using statistics, and conducts the enquiry in an unbiased and objective manner (Cresswell, 2008: 46). I considered this approach as appropriate because questionnaires are regarded to be useful when surveying large samples of respondents. McMillan and Schumacher (2001: 602) define a survey research as “the assessment of the current status, opinions, beliefs, and attitudes by questionnaires or interviews from a known population”. In this study, a survey was used to gather quantitative research data through questionnaires on the extent to which the UBE policy is deemed to have been implemented in some Nigerian schools.

4.2.2 The research instrument

A questionnaire refers to a data-collecting instrument that is used to get responses on items or questions by using a form that the respondents complete (Bless, et al. 2006: 117-121). I used questionnaires as they are considered by Nardi as useful for surveying relatively large numbers of respondents in a short period of time and also because a standardised data set is obtained that can easily be compared and interpreted (Nardi, 2003: 59). By doing this an understanding of the extent of

implementation regarding the UBE policy can be gained to help me comment on effective implementation of free and compulsory education. Four different questionnaires were compiled because different groups were involved, namely the students, teachers, principals (together with the vice-principals) as well as parents. Data was obtained based on statements to which the respondents had to respond on a Likert scale (cf. Cohen and Manion 1989: 312-323). This offers respondents the opportunity to indicate degrees of agreement or disagreement along a scale of five fixed alternatives. In designing the questionnaire for this study, the neutral opinion was used as a middle choice for those respondents who wished to remain neutral or who did not want to commit themselves to either the positive or negative.

In compiling the questionnaire, I considered the underlying issues discussed at the 1990 World Conference on EFA which was held in Jomtien, Thailand as stated in chapter 2 of this study (cf. 2.2). Furthermore, the analysis of the Nigerian UBE policies in chapter 3 of this study also points out that, in order to achieve EFA, it is expected that these countries will not only make basic education free and compulsory for their citizens, but will remain committed to providing the human and material resources needed to deliver quality and equitable basic education to children, youths and adults (cf. 3.1). Based on the literature study and the policy analysis, items related to the following themes were included in the questionnaire:

Table 2: Themes in the questionnaire

Short	Description
Right to Education	The students' right to equal education is upheld
Funding	Funding is provided to enable the implementation of the UBE policy
Environment	The environment is conducive to teaching and learning, enabling the implementation of the policy
Teachers	The teachers are able to provide quality education in line with the UBE policy
Structures and support	Structures, capacity and support are in place to implement the policy
Resources	The state provides resources to support teaching and learning
School fees	In line with the UBE policy, the parents are in no way required to pay school fees or have school-related expenses
Implementation	The OBE policy is correctly implemented

Positive effect	The effects of policy implementation are good and can be observed
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4.2.3 Sampling

A sample is a small proportion of a population selected for observation and analysis (Best & Kahn, 2003:12-19). According to Johnson & Christensen (2004: 218), sample size is recommended according to the size of the population researched and a number of factors have to be taken into consideration, including the complexity of the population and the categories you want to use when analysing the data. In this study, a multistage sampling was used. During the first-stage sampling I used judgement sampling, which Cooper and Schindler (2003:201) explain as a type of purposive sampling. This type of sampling involves the researcher to select sample members who conform to specific criteria. In this case I used secondary schools, because I wanted to include students, and also rural and urban schools as I believe their realities might be different. These two rural secondary schools and two urban secondary schools in Rivers State were selected. They were from two local government areas (LGAs) in Rivers State namely Obio/Akpo, which represents a typical urban area, and Ikwerre LGA which is typical rural area. This was done in order to have reliable data to give a balanced state of UBE implementation in Rivers State.

A set of role-players were requested to take part in the survey from each school, and while I requested that the students (with their parents) and the teachers must be selected randomly, this was beyond my control. The principal and the two vice-principals were recruited, and then 10 teachers, 20 students and 20 parents, selected by the school, participated in the survey. I therefore set out to include 80 students, 80 parents, 40 teachers, 4 principals, and 8 vice-principals in the study.

4.2.3.1 Challenges

I experienced some challenges in the course of trying to get the schools to participate in the survey. I worked with the assumption that because I had taught as a teacher in the two LGAs that it would be easy for me, but when I arrived at the first school the principal did not accept me, even with the approval letter I obtained from the UBE

board and I was asked to go back to the board to get another letter stating that that particular school would be used for the survey. I reported to the board and the secretary confirmed to the principal via telephone that I have been permitted to go to any four schools of my choice in the two LGAs to distribute the questionnaires. Only after that was I allowed to carry out the survey.

Another challenge I encountered was that of non-returned questionnaires. After I obtained permission to enter the schools, I gave out twenty questionnaires to twenty students from each of the schools, and twenty parent questionnaires to the students for their parents to complete at home. By the following week when I went back to retrieve them, some students said they forgot to return them, while others said that their parents travelled during the weekend. There were many excuses for not returning questionnaires.

4.2.3.2 Final sample

In spite of the mentioned challenges, I managed to distribute questionnaires in all four schools, and to retrieve a good number of them. A total number of 212 questionnaires were distributed of which 201 (94.8%) were returned. These became the sample for this research which was used for the analysis. Details of the final sample are provided below.

Table 3: Final sample

	Female	Male	Not indicated	Total (n)
Student questionnaires	39	41	0	80
Teacher questionnaires	21	18	1	40
Principal questionnaires	7	5	0	12
Parent questionnaires	38	30	1	69
	105	94	2	201

The students were all in JSS3 (the equivalent of Grade 9 in South Africa), with ages ranging from 12 years to 19 years old. The details are provided in the diagram below:

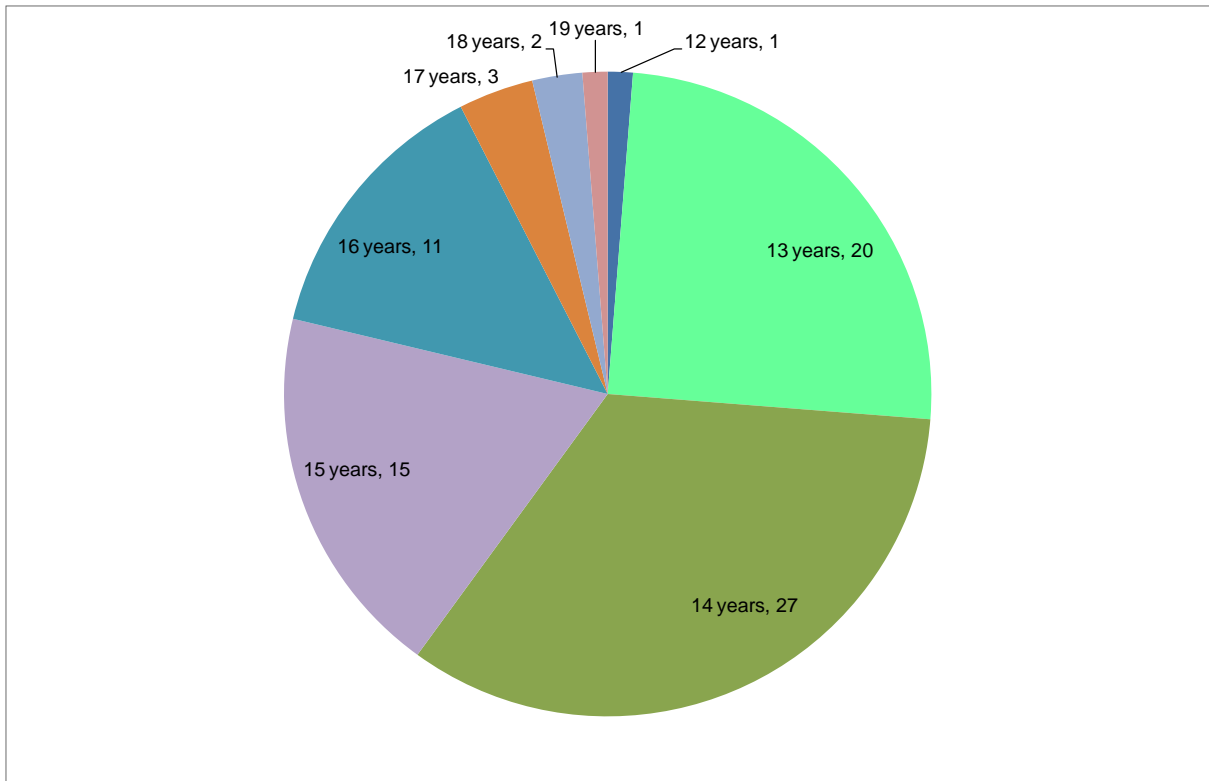


Figure 3: Age distribution of the student respondents (n=80)

Teachers with varying number of years of experience took part in the survey. Their years of experience are indicated in figure 4 that follows. Furthermore, 38 of the teachers had a first degree, with one teacher-respondent who only had a diploma, and one who had a Master's degree.

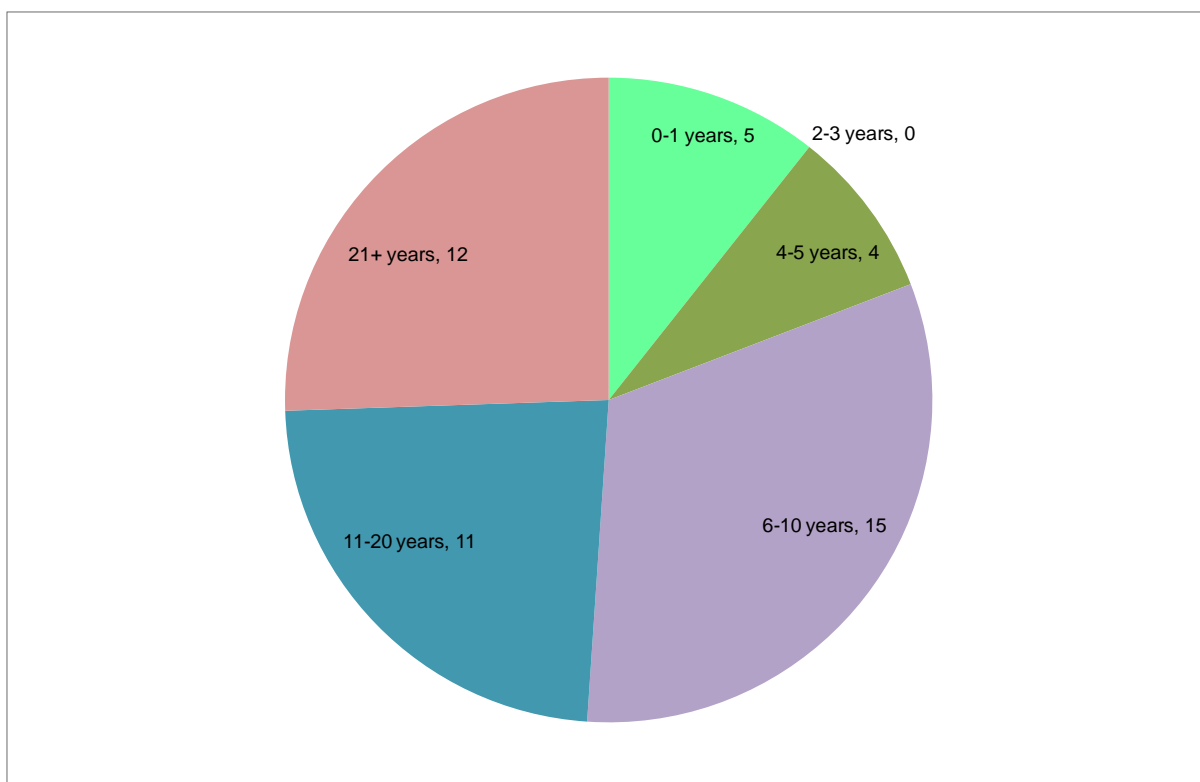


Figure 4: Teacher years of experience in the sample

Some of the principals and vice-principals from the schools have been in their positions for quite some time, while others were only appointed recently. The detail of their years of experience in management is indicated in figure 5.

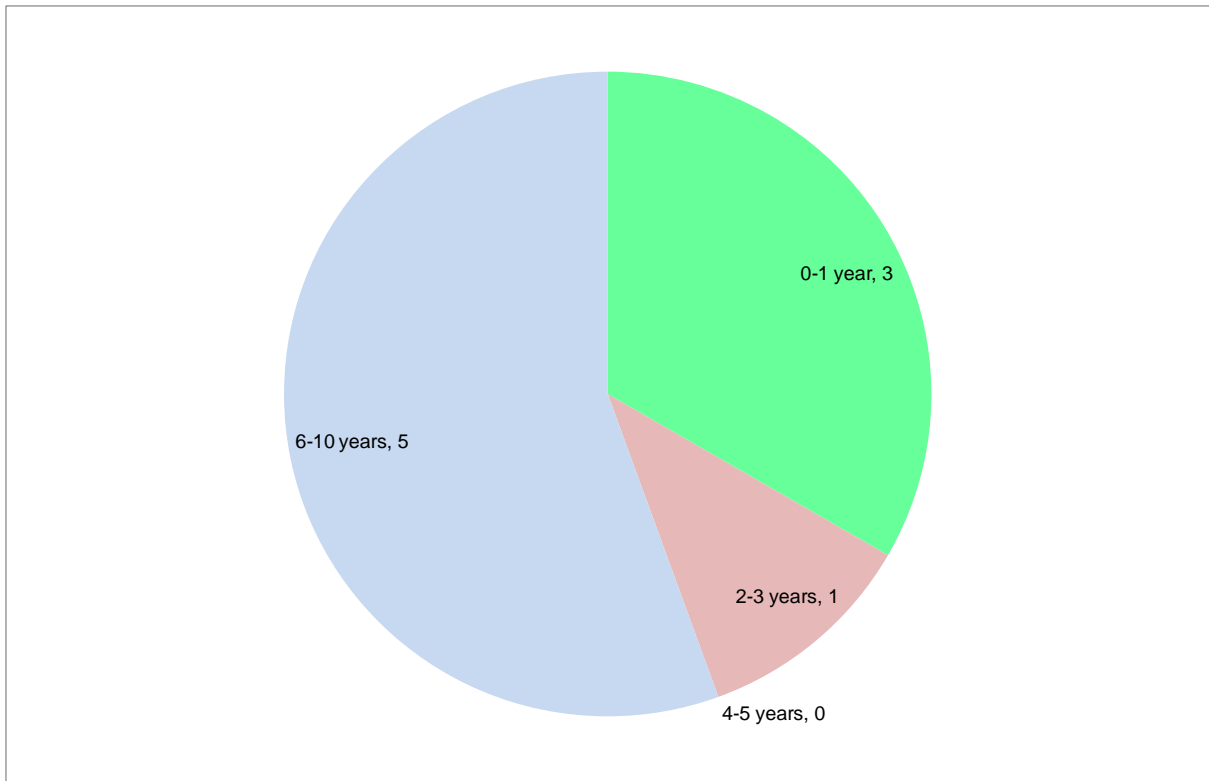


Figure 5: Experience of principals / vice-principals as managers

Most of the parents indicated that at least one of the two parents was employed, but four indicated that both were unemployed. However in response to the open question on employment, some indicated their hardships with comments such as *because of the situation of things in the country things have not been easy for us; and our income is not enough and this weakens the family*. The majority of the parent-respondents also indicated that they have a relative large number of children, as is indicated in figure 6.

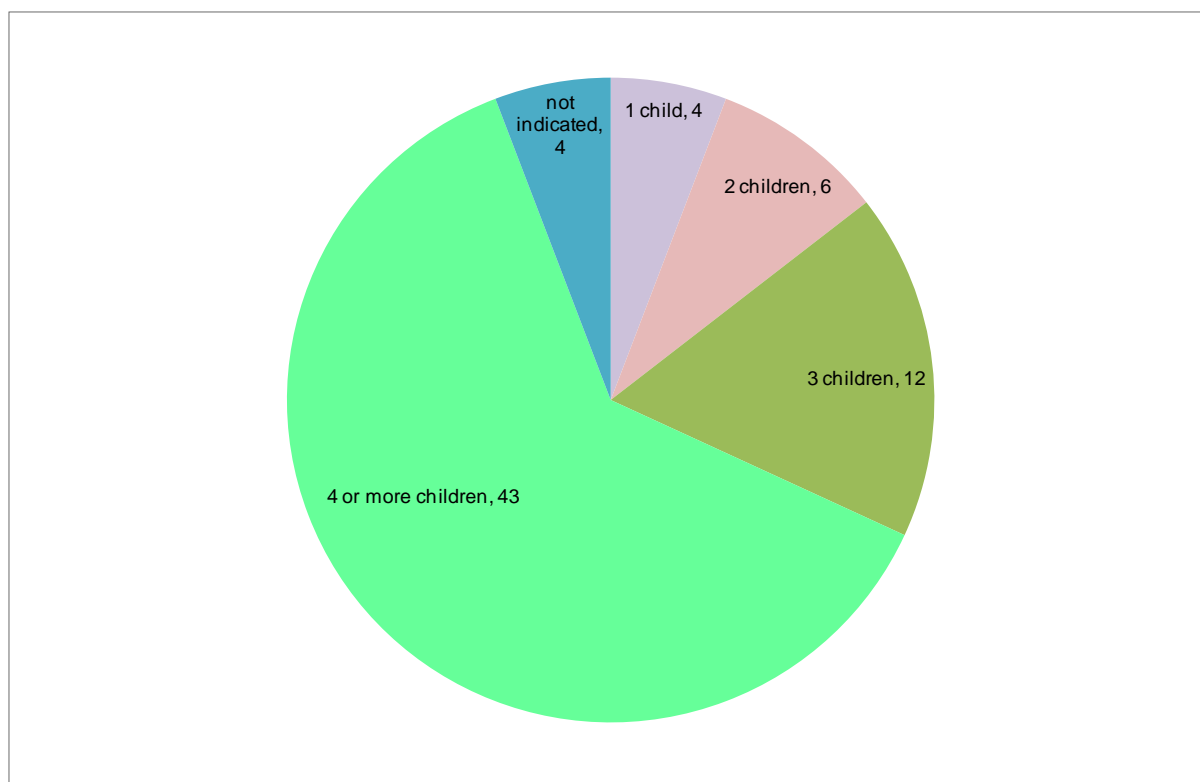


Figure 6: Number of children of parents in the sample

As researchers we need to take steps to promote the integrity of our work. This includes considering how you work with your respondents in order to get information, but also how you deal with the information you collect.

4.2.4 The integrity of the survey

Ethical issues were considered as well as reliability and validity of the research in order for me to produce trustworthy findings.

4.2.4.1 Ethical consideration

Sikes (2004: 24) establishes that it is necessary for researchers to put into consideration the ethical implications of his/her research on paper for people who may be touched by the research. He further established that researchers must do everything possible to avoid harming or wronging anyone that may be involved in the research (Sikes, 2004: 32). I obtained permission from the River State authorities to carry out the research, and then obtained consent from the school principals, teachers, parents and students before asking them to complete the questionnaires

(cf. Mouton, 2001: 244). Mouton (2001: 244) added that participants must be informed about what will happen and should give their signed consent, which I adhered to.

I made it clear to participants that they were allowed to freely withdraw from the study at any stage and that their identities would be protected (cf. Maree & Van der Westhuizen, 2007: 41-42). I furthermore stated explicitly that the respondents should refrain from writing their names, or the names of their schools, on the questionnaire. I provided the schools with stickers, and asked the students to fold their questionnaires and seal them with the stickers to ensure the confidentiality of the research. Based on this, I obtained ethical clearance from the University of the Free State to conduct the survey (REF UFS-EDU-2013-070),

Strydom (2005: 6) stated that it is the responsibility of the researcher to provide the respondents and the research community with valid research results. Following this, I took some steps to enhance the reliability and validity of my research project.

4.2.4.2 Validity

Validity refers to the degree to which the measuring instrument measures what it is supposed to measure (Uys, 2003: 123). There are different types of validity, namely content validity, criterion validity, construct validity and face validity. Content validity means that we determine whether the whole content of the definition is represented in the measuring instrument, and face validity is determined by asking experts in a particular field to judge the measuring instrument (Uys, 2003: 122-124). In this study, the instrument was validated by experienced quantitative researchers at the Faculty of Education, University of the Free State, who moderated and modified the items in the questionnaire to improve its face validity. The questionnaires used for this research project was constructed to ensure ease of use, but based on a comprehensive literature study as well as an analysis of the UBE policy. I thus deem the questionnaire valid in terms of content. The questionnaires were designed for principals and vice principals, teachers, parents and students. I delivered the questionnaires by hand so that the respondents could respond in their own time, and made appointments to collect the questionnaires at a later stage. The group of students that participated in answering the questions was the JSS 3 students, who

are the most senior students in the school. I selected them as I thought that they would best be able to give a true picture of the extent to which the UBE free and compulsory education policy is implemented in a selection of Nigerian schools. Based on this, I believe the questionnaire is valid.

4.2.4.3 Reliability

Reliability means the consistency the instrument demonstrates in measurement (Neuman, 1997:138-141). Reliability is also the degree to which the instrument measures consistently (Best & Kahn, 2003: 277; Goddard & Melville, 2001: 41). A measuring instrument is consistent when it produces equivalent results for repeated measurement. As this was a self-constructed questionnaire, used for the first time, the only reliability that I can claim is that of internal consistency. Internal consistency was measured using the Cronbach alpha coefficient for the various sets of returned questionnaires (Santos, 1999:1-5; Cronbach, 1951: 297-334). The alpha values are indicated in the table below:

Table 4: Cronbach alpha coefficients for the sets of questionnaires

	nr of respondents (n)	nr of scaled questions	alpha coefficient
Student questionnaires	80	27	0.7003
Teacher questionnaires	40	63	0.9392
Principal questionnaires	12	47	0.6711
Parent questionnaires	69	35	0.8875

According to Jacobs (1991: para 14) this coefficient provides us with certain information about the reliability of the responses: a figure of 0.9 or higher suggests an excellent level, while 0.7 is the cut-off point for being an acceptable level. Using this as an indication of reliability for the different data sets, it seems as if the teacher data and the data obtained from the parents are the most reliable to use. While all the data will be used, this will be taken into account in the final discussion of this chapter.

4.2.5 Data analysis

Data analysis is a systematic search for meaning. It is a way to process quantitative data so that what has been learned can be communicated to others (Hatch in Leech and Onwuegbuzie, 2007: 564). Analysis means organising and interrogating data in ways that allow researchers to see patterns identifying themes, discover relationships, develop explanations, make representations, mount critiques, or generate theories. It often involves synthesis, evaluation, interpretation, categorisation, hypothesising, comparison, and pattern finding. It always involves what is called “mindwork” (Wolcott 2001:148).

The data was captured in Microsoft Excel, and basic analysis was done. Thereafter, the aggregated data was transferred to the Stata-IC11 statistics programme, and analysed by an experienced data analyst.

In quantitative research, the researcher decides what to study, asks question, collects quantifiable data from participants, analyses these numbers using statistics, and conducts the enquiry in an unbiased, objective manner (Creswell, 2008: 46). In this study, data will be presented and analysed by exploring the responses of participants to the overall question posed in this chapter using the following statistics:

4.2.5.1 Mean score

The mean score is regarded as a measure of central tendency which represents the average of a given group of scores (Bernstein *et al.*, 2005: 61). It is acquired by putting together all the scores and dividing the result by the number of scores entered (Bernstein *et al.*, 2005: 59). In this study, the mean score serves as an indication of the extent to which the UBE policy is regarded by the respondents as being implemented

4.2.5.2 Standard deviation

The standard deviation is a measure of variability (Altman 2005: 903). The standard deviation is expressed as the data in the same unit but have percentage points as the unit (Altman 2005: 903). Standard deviation is basically used to measure confidence in statistical conclusions. Since standard deviation shows how much the

scores differ from the mean, the higher the standard deviation, the greater the dispersion of scores and vice versa (Bernstein, et al., 2005: 62).

The sample I used is relatively small, and I do not claim that it is representative, even if I tried to minimise bias. In the analysis of the data I therefore cannot make inferences, and can merely use the above descriptive statistics (mean score and standard deviation, and also percentages) to answer the research question that guides this chapter.

4.3 RESULTS

4.3.1 Overview

The overall score of all the respondents on all the constructs, is 3.266, a fairly neutral response on the extent to which the UBE policy is implemented. The mean scores per aspect of implementation are indicated in the table below, sorted from the highest to the lowest values:

Table 5: Descriptive statistics on aspects of the implementation of the policy

Description	Mean score M	Standard deviation s
The teachers are able to provide quality education in line with the UBE policy	3.9857	0.9821
Structures, capacity and support are in place to implement the policy	3.6798	1.3512
The OBE policy is correctly implemented with regards to other matters than the above	3.6705	1.3065
The students' right to equal education is upheld	3.6676	0.7002
The effects of policy implementation are good and can be observed	3.3683	0.8349
Funding is provided to enable the implementation of the UBE policy	3.2551	1.2508
In line with the UBE policy, the parents are in no way required to pay school fees or have school-related expenses	2.9187	0.8359
The environment is conducive to teaching and learning, and therefore makes the implementation of the policy possible	2.6329	1.2461
The state provides resources to support teaching and learning	2.3883	1.0429

In general respondents were the most positive about the ability of teachers to provide quality education (M=3.9857). The provision of resources by the state to support teaching and learning however seems to be disappointing (M=2.3883). The respondents indicated dissatisfaction with the environment seemingly not being conducive to teaching and learning (M=2.6329), while the policy directive that parents are in no way to be required to pay school fees, or have related expenses, are not consistently honoured (M=2.9187).

4.3.2 Views of different sets of respondents

The above information was further unpacked by investigating how the different sets of participants viewed the extent of implementation of the UBE policy, in relation to the above aspects. This is indicated in the table below:

Table 6: Aspects with regard to the implementation of the UBE policy as viewed by sets of respondents

Description	Mean score (M)			
	Students	Teachers	School principals	Parents
The students' right to equal education is upheld	3.6600	3.3516	3.3600	3.9130
Funding is provided to enable the implementation of the UBE policy	3.7468	2.5417	2.3958	-
The environment is conducive to teaching and learning, and therefore makes the implementation of the policy possible	2.4738	2.2006	2.9583	3.0476
The teachers are able to provide quality education in line with the UBE policy	4.1500	3.6405	3.8750	4.0145
Structures, capacity and support are in place to implement the policy	4.4342	3.2955	3.3917	3.0781
The state provides resources to support teaching and learning	2.6709	2.6917	2.9167	1.7971
In line with the UBE policy, the parents are in no way required to pay school fees or have school-related expenses	2.8017	3.4228	4.0000	2.5874
The UBE policy is correctly implemented with regards to other matters than the above	4.4810	2.2750	2.9861	-
The effects of policy implementation are good and can be observed	-	3.1935	3.2628	3.4879
Overall	3.3082	3.0683	3.2349	3.3665

Funding of the UBE free and compulsory education is a vital component of the policy. The findings of this study indicate that there is poor funding towards the implementation of the UBE policy as indicated by the teachers (M=2.5417) and the school principals (M=2.3958). This hampers adequate implementation of the UBE free and compulsory education policy.

Generally, the students and parents were most positive about the teachers' ability to provide quality education (Students: M=4.1500; Parents: M=4.0145). However, students along with teachers and school principals expressed dissatisfaction on the state of the learning environment which is not conducive for teaching and learning (Students: M=2.4738; Teachers: M=2.2006; School principals: M=2.9583), so this causes a hindrance to the implementation of UBE. Additionally, the students also pointed out that structures and support are in place for effective implementation of the UBE (M=4.4342). Nevertheless the state's role, which is to provide resources to support teaching and learning, appears to be disappointing as reflected by all groups of respondents (highest M=2.9167).

According to the UBE policy, parents are not meant to pay school fees or have any school-related expenses, yet the respondents indicated that they are made to pay fees which is contrary to the UBE policy on free and compulsory education (Students: M=2.8017; Parents: M=2.5874), while the principals expressed the contrary (M=4.0000). With respect to the extent to which the UBE policy has been implemented, the payment of fees implies poor implementation.

On all other matters regarding the correct implementation of the UBE policy, teachers (M=2.2750) and principals (M=2.9861) express profound displeasure, while the response from students was different (M=4.4810).

4.3.3 Strengths and weaknesses with regard to implementation

The above central tendencies were based on detail obtained from the questionnaire, and I thus deemed it important to look at aspects pointed out as being best implemented, as well as those of major concern. This is displayed in the diagrams

that follow. The percentages reflect positive scores with regard to the statements (i.e. a score of 4 or 5).

4.3.3.1 Strengths and weaknesses according to the students

Certain aspects of the UBE policy were pointed out by students as being largely successfully implemented. These are indicated below:

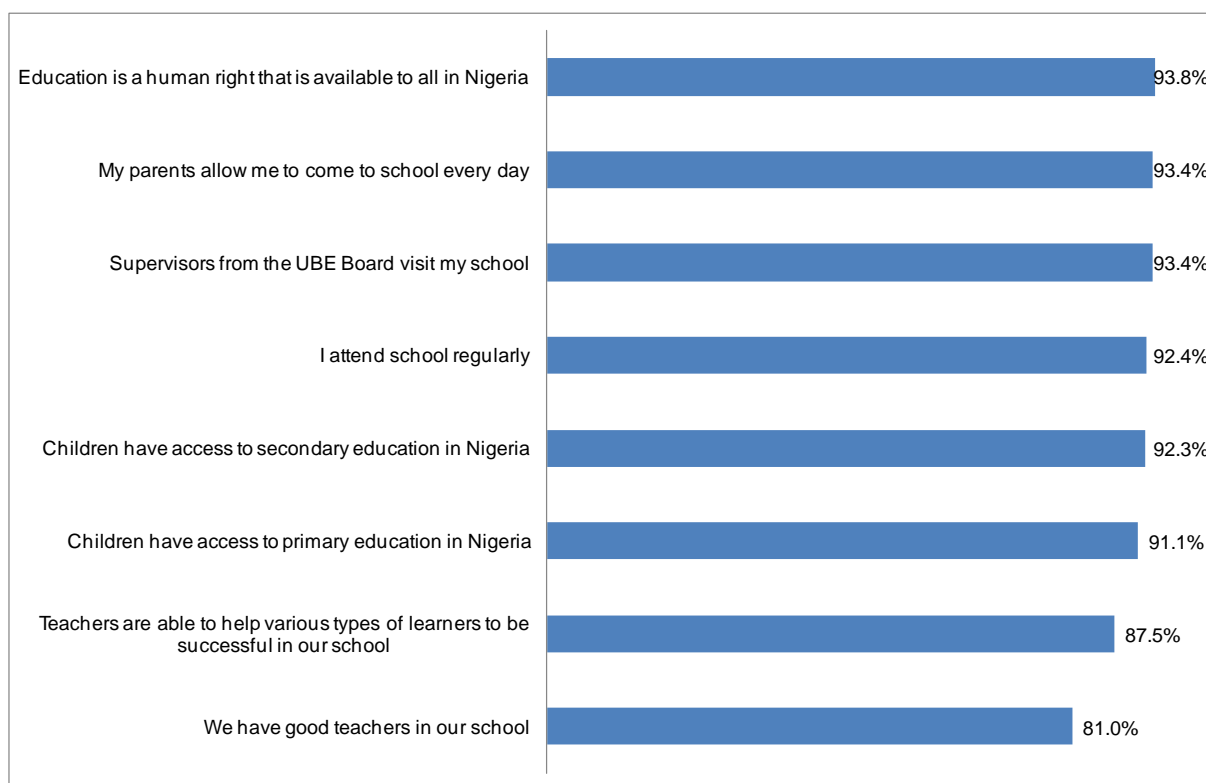


Figure 7: Positive aspects pointed out by students

Findings from the student questionnaire showed that basic education is a right that is made available to all Nigerians. The students were positive about their parents and teachers in the sense that the parents allow them to go to school and their teachers are available at school to help transmit knowledge and skills to them. This will consequently help in the achievement of the implementation of the UBE policy.

The students were also critical of some aspects of implementation, and scored the following aspects quite low:

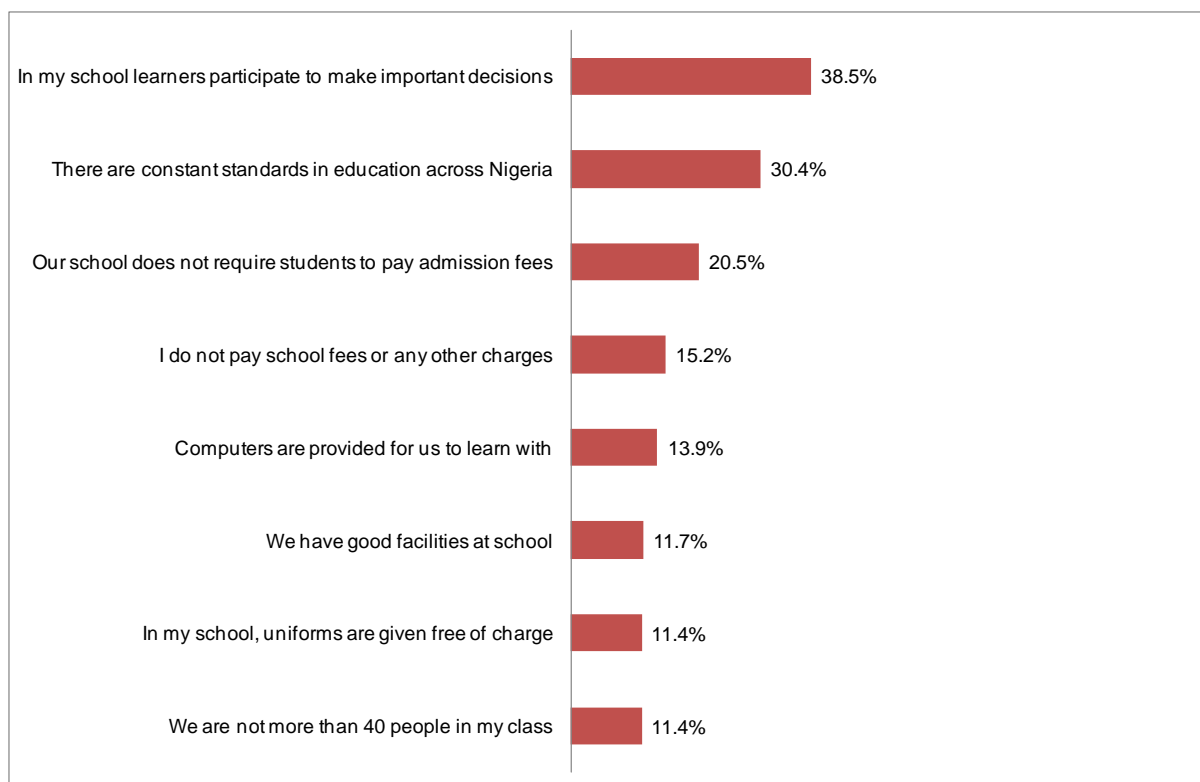


Figure 8: Negative aspects pointed out by the students

The students were negative with regard to the general standard of education in Nigeria, pointing out that there are no constant standards in education across Nigeria which erodes the principle of equality and equity. Equally important are several other issues highlighted in the figure above that have posed a strong limitation to the actualization of UBE free and compulsory education policy in Nigeria. Of particular importance is the fact that parents or guardians are made to pay both admission fees and school fees amongst other fees for their children and wards which contravenes Section 3 (3) of the UBE policy. All these will obviously disrupt the implementation of the policy.

4.3.3.2 Strengths and weaknesses according to teachers

The parents, who seemingly gave the second most reliable responses (cf. 4.2.4.3) were very positive about the extent to which some aspects of the UBE policy were implemented. These are indicated in figure 9 below:

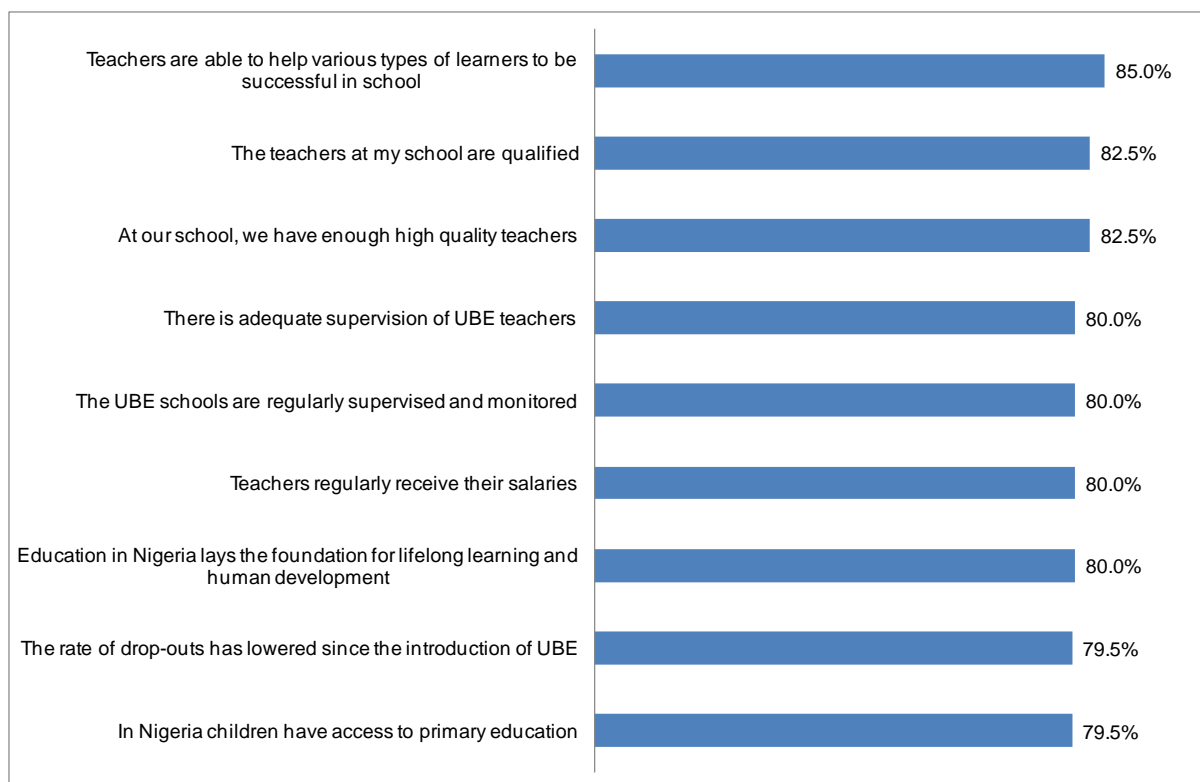


Figure 9: Positive aspects pointed out by teachers

Findings from the survey show that teachers are positive in terms of their own ability to transfer knowledge and skills, their qualifications, general incentives and salary. Undeniably, these amongst other variables elucidated in figure 9, are essential in assessing the extent to which the UBE policy has been implemented.

Some weaknesses also came to the fore from the analysis of the data supplied by the teachers.

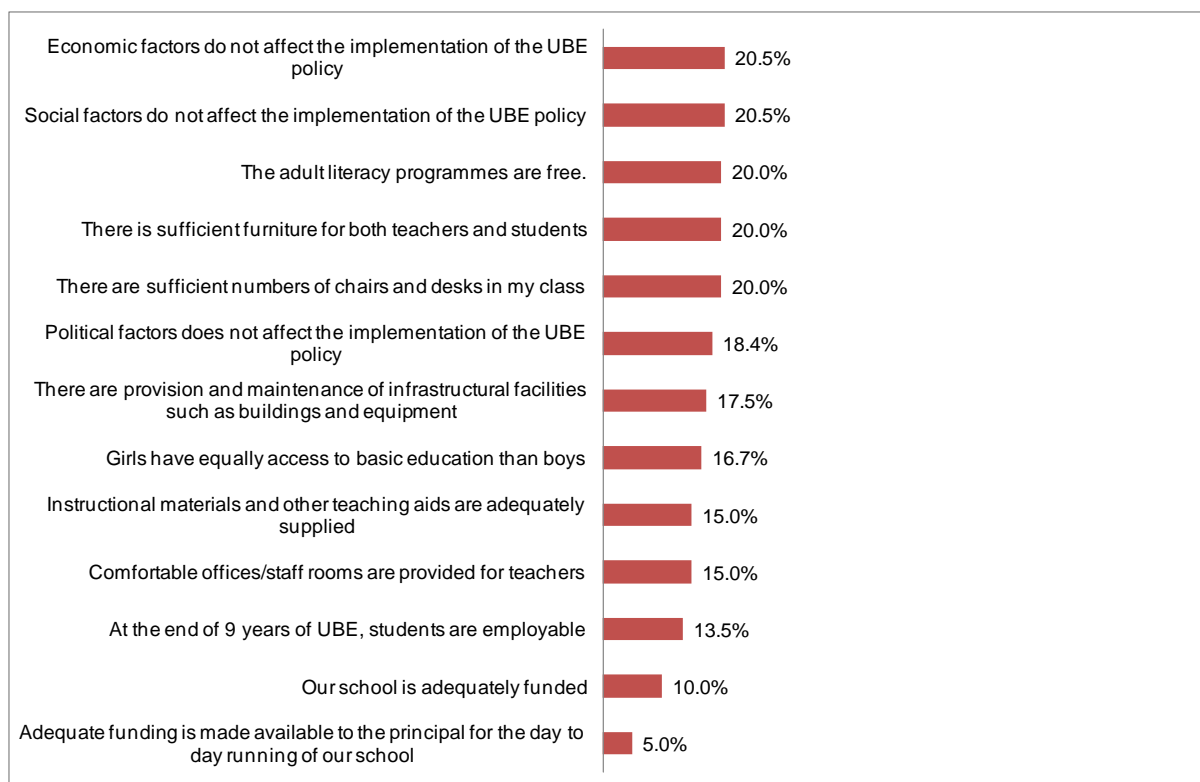


Figure 10: Negative aspects pointed out by teachers

The teachers expressed dissatisfaction in terms of the economic, social and political state of Nigeria. They feel that these issues have posed a hindrance to the implementation of UBE due to lack of funds, materials and other needed facilities. Likewise there is poor access for girls to basic education. Instructional material and resources are lacking, and the teachers do not seem to believe that the UBE provides students with the skills and knowledge they need in order to be employable.

4.3.3.3 Strengths and weaknesses according to principals and deputy principals

Although the responses of the principals and vice-principals were indicated to be the least reliable, I did consider the strengths and weaknesses they pointed out.

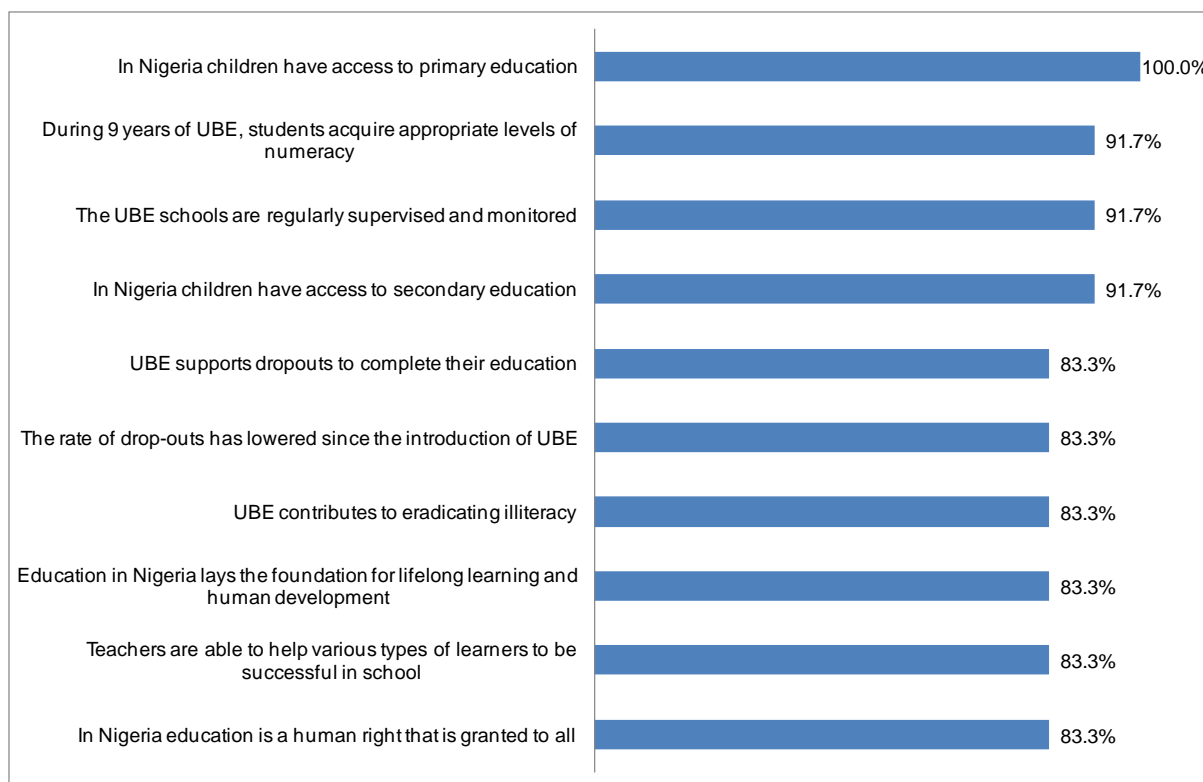


Figure 11: Positive aspects as pointed out by principals and deputy principals

The school managers who took part in the survey were generally positive about the accessibility of education in Nigeria, the contribution that UBE makes toward eradicating illiteracy, and the rate of students dropping out. Like the teachers, they responded positively about the supervision and monitoring of UBE schools that seems to take place regularly.

There were, however, aspects about which the principals and deputy principals were negative, and these are indicated in figure 12.

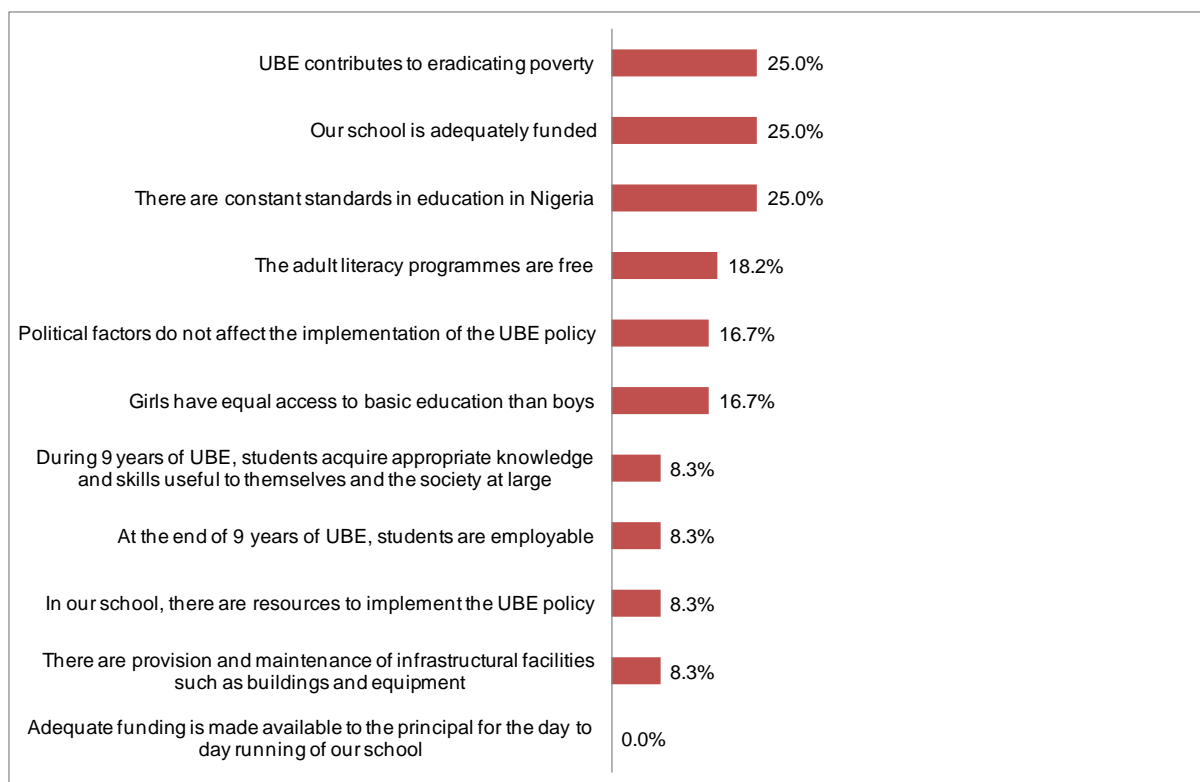


Figure 12: Negative aspects as pointed out by principals and deputy principals

The principals and their deputies have expressed profound displeasure regarding the UBE programme with emphasis on its standard and financing. They agreed with the teachers that funds and resources are not made available to them to run the schools. This implies that the UBE policy is been jeopardised and implementation is impeded.

4.3.3.4 Strengths and weaknesses according to parents

The parents had particular aspects which they were positive about.

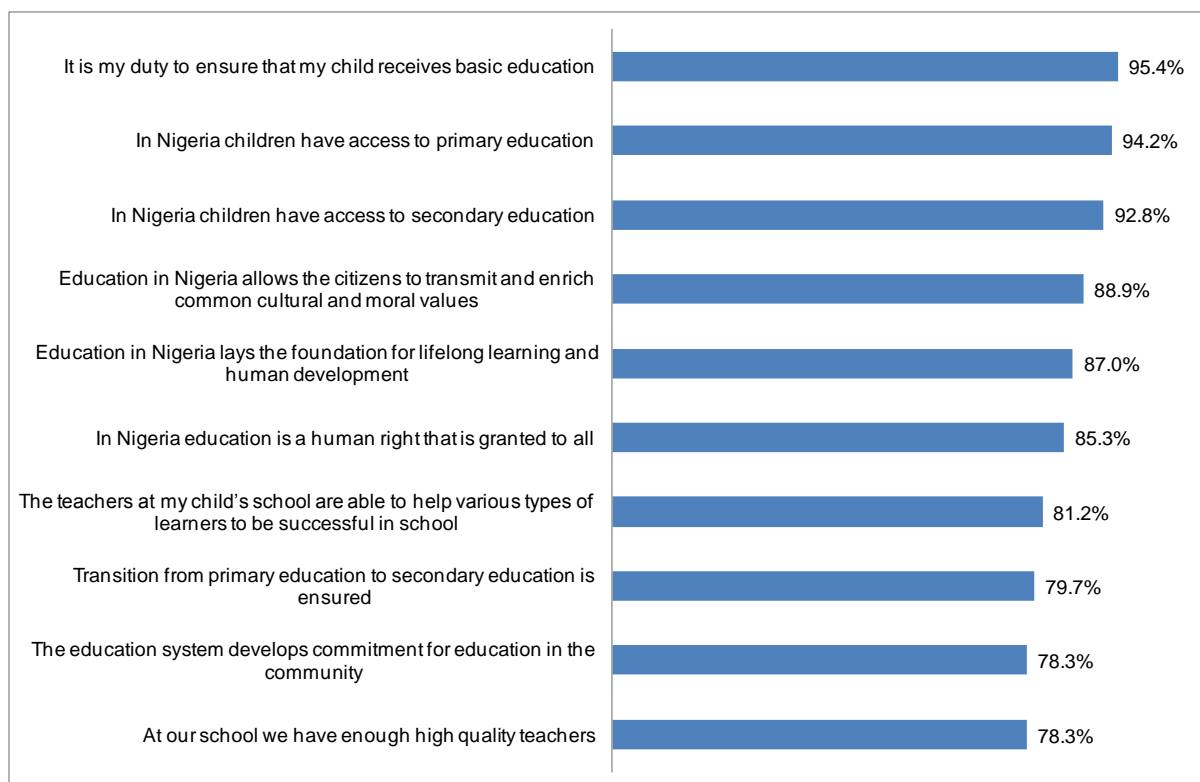


Figure 13: Positive aspects as pointed out by parents

With the directives in the UBE policy the parents are sending their children to school. Furthermore, parents particularly expressed understanding on the importance of basic education as a foundation for both human and capital development in the Nigerian community. I believe that this understanding is vital as it becomes the driving force on the part of the parents in ensuring their children have basic education. The parents, like the students, were positive about the teachers at the schools.

There were, however, aspects of implementation about which the parents were negative, and these are indicated in the diagram that follows.

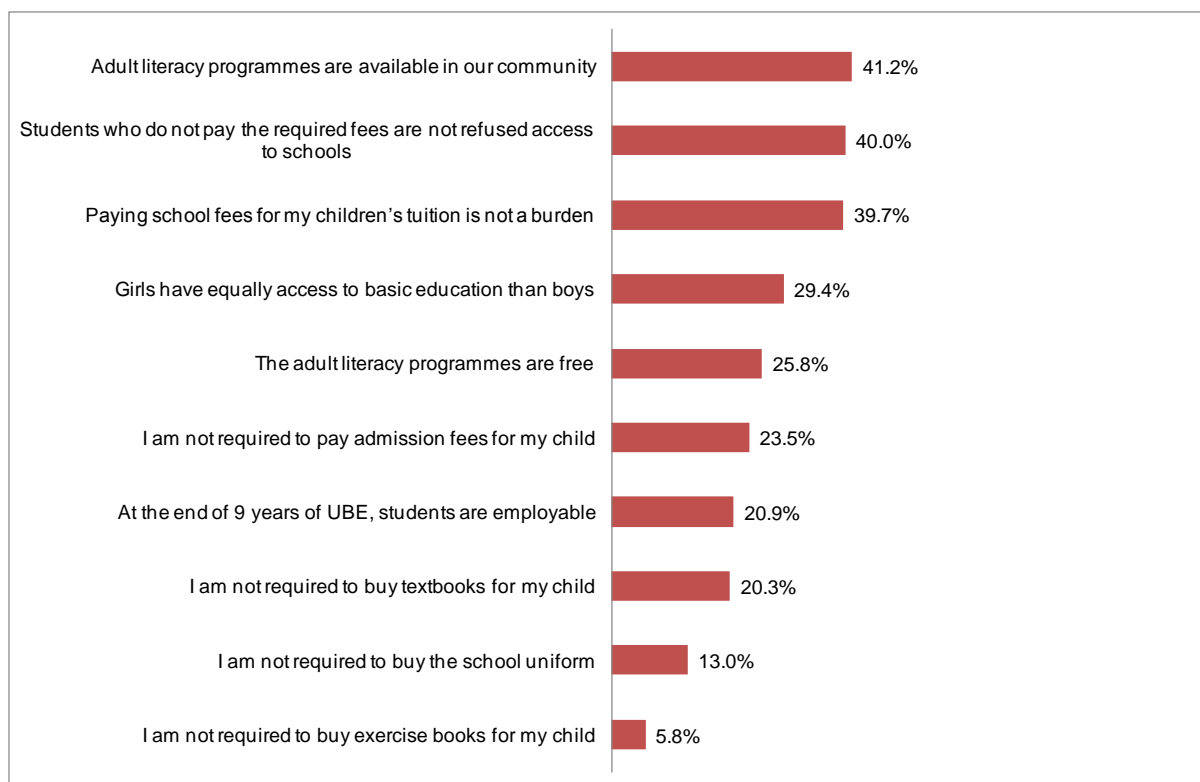


Figure 14: Negative aspects as pointed out by parents

Notwithstanding claims by school managers that school fees are not charged, the responses summarised in figure 14 clearly shows that parents are made to pay different kinds of fees for their children. This obviously puts a limitation on the implementation of the UBE policy on free and compulsory education as poor parents may not be able to pay those fees and hence their children are denied access to basic education. The parents are seemingly expected to buy exercise books, school uniforms and textbooks. Parents indicated that they have to pay admission fees for their children, and only 40% indicated that children are not sent home of school fees are not paid.

4.4 DISCUSSION

It became clear though the analysis of the data that some aspects of the UBE policy is indeed implemented. There seems to be a general agreements amongst the different sets of respondents that students' right to education is upheld (4.3.2) and that children of Nigeria have access to education at primary and secondary level (4.3.3). The teachers are seemingly doing a very good job to provide education to the children, and it is particularly encouraging that the students seem to believe that

teachers are able to help various types of learners to be successful (4.3.3.1). The respondents indicated their satisfaction with the level of supervision and monitoring to implement the policy (4.3.3.1; 4.3.3.2; 4.3.3.3) and parents are making sure that children do attend school (4.3.3.4).

The non-implementation of aspects of the UBE policy mainly has to do with funding and other resources. It seems as if the state is not adequately providing resources and funding, and this impact negatively on the teaching environment (3.2.1). Parents and students are in particular clear on this issue (4.3.2). Students indicated that in general they have to sit in classes of more than 40 students, and facilities are poor (4.3.3.1). Parents indicated that they have to pay school fees, but also have other expenses such as buying school uniform, exercise books and textbooks (4.3.3.4). Teachers have to teach in environments that are not satisfactory, where there are not sufficient furniture and proper infrastructure (4.3.3.2). Another aspect of the policy that is found wanting is equal education for boys and girls. The respondents agreed that in spite of the intention of the UBE policy, girls are still disadvantaged (4.3.3).

4.5 CONCLUSION

In this chapter I explored the extent of implementation of the UBE policy in four schools in the Rivers State of Nigeria. Based on the results of the survey as discussed above, I conclude that the policy is only partially implemented, mainly due to a lack of resources and funds. Yet, teachers are singled out as doing what is required to implement the policy.

In the chapter that follows, I build on this insight in order to gain a better understanding of the realities regarding the implementation and the consequences thereof.

CHAPTER 5: CONSEQUENCES OF THE EXTENT OF IMPLEMENTATION OF THE FREE AND COMPULSORY EDUCATION

5.1 INTRODUCTION

The previous chapter described the extent to which the free and compulsory UBE policy is implemented in a selection of Nigerian schools. One issue that emerged from the analysis of the responses by the principal, teachers, parents and students is that the government is not providing the schools with the necessary resources and teaching materials needed to effectively implement UBE in the country.

In this chapter, the consequences of the extent of implementation of the UBE policy will be explored through the analysis of semi-structured interviews conducted with members of the Rivers State UBE board, parents and teachers from the selected schools. The aim of this chapter is to respond to the research question “what are the consequences of the extent of implementation of free and compulsory education”.

5.2 RESEARCH METHODOLOGY

In this last empirical stage of this multi-method study, I complement the other chapters by following a qualitative approach.

5.2.1 *Qualitative approach*

Qualitative research is a type of research in which the researcher relies on the views of participants and conducts the inquiry in a subjective, biased manner (Creswell, 2008a: 46). According to Creswell (2008b: 7), qualitative research is an inquiry approach used for exploring and understanding a central phenomenon. For the researcher to learn about this phenomenon, s/he asks the participants general questions, takes the view of the participants in the form of words or images, and analyses the information for descriptions and themes. The researcher then interprets the meaning of the information from the data, drawing on personal reflections and past research. Qualitative research seeks to understand how people make sense of

their world and their experience in the world. It also has to do with their lived experience (Hancock, 1998: 2; Merriam, 1998:6).

This aspect of my study focuses on the view of stakeholders (teachers, principals and UBE board officials) on the consequences of the extent of implementation of free and compulsory education in the Rivers State and Nigeria at large and I will interpret the meaning of the response given by participants in the study.

Merriam (1998: 7) states that qualitative research involves field work, therefore one must go to the people, institution or site. To get information about the consequences of the extent of implementation of free and compulsory education, I therefore went to various schools and the UBE board to interview the teachers and board officials in their offices. Furthermore, qualitative research is described as richly descriptive (Merriam, 1998: 8). Words are used to describe the experience of the participants. With respect to this study, I will provide a description of the possible consequences of the extent of implementation of free and compulsory education as provided by the experiences of the participants. From the above exposition on the qualitative approach, I can say that this is a qualitative study because it satisfies the characteristics of a qualitative study as stated by different authors.

5.2.2 Selection of participants and research area

While the term sampling is generally used in the selection of people to obtain data, Polkinghorne (2005: 139) prefers that *selection of participants* rather than *sampling* be used in qualitative research. He is of the opinion that researchers should take the purpose of the study into consideration when deciding who to select as participants in the research project. Creswell (2008b: 31) added that among others, the participants should be selected with the aim of developing an understanding that might bear useful information and give voice to silenced people. In this study, useful information can be gained from the participants in order to get to know more about the consequences of the extent of implementation of free and compulsory education in Nigeria, and this might assist in giving the UBE stakeholders a voice.

The study was conducted in two of the local governments, namely in the Obio/Akpor Local Government Area (LGA) and in Ikwerre LGA. Two schools from each of these

LGAs were selected for this research - the same schools at which the survey was conducted (cf. 4.2.3). A total number of ten stakeholders were interviewed. I interviewed three female teachers, three male teachers, one male principal, one male vice principal, one female and three male UBE board officials. The participants were therefore all people who are actively involved in the schools so that they can provide insight and multiple views into the consequences of the extent of implementation of the UBE policy. Semi-structured interviews were employed as a data collection strategy.

5.2.3 Data collection strategy

I used interviews as my data collection strategy. According to Nieuwenhuis (2007a: 87), an interview is a two-way conversation through which the interviewer asks the participants a set of questions in order to gather data and to learn the behaviours, views and opinion of the participants. The interviews will serve as a following-up on the information gathered through the survey (cf. 1.5.4.3). Semi-structured questions were posed and directed to the participants with the intention of getting adequate information regarding the consequences of the extent of implementation of the policy. The advantage of this is that it enables the interviewer to probe the participants and get clarification of answers. It allowed me as researcher to understand the way in which the participants construct knowledge, in other words how they see and understand the implementation of the UBE policy and its consequences (Nieuwenhuis, 2007b: 87).

In qualitative research, the researcher and the participant are in a direct interaction (Cohen *et al*, 2000: 292). Kvale (1996: 2) emphasises that ethical issues such as informed consent, confidentiality and consequences for the interviewees should be taken into consideration when doing qualitative research.

5.2.4 Ethical considerations

In addition to the aspects discussed in chapter 4 which are also relevant here, such as voluntary participation and informed consent (4.2.4.1), in this phase of the research I had to consider particular aspects pertaining to ethics in qualitative research to avoid harming or wronging anyone that may be touched by the research

(Sikes, 2004: 32). Eisner (1998: 221) in this regard points out that it is important to pay attention to ethical consideration in qualitative research because an event that is neglected can cause serious problems for the researcher as well as the participants.

I particularly paid attention to confidentiality. Confidentiality is an explicit guarantee by a researcher to a respondent in social science research where the respondent is confident that any information provided to the researcher cannot be attributed back to that respondent. Furthermore, the assurance of confidentiality carries with it the additional implication that non-researchers cannot discover the respondent's identity. Confidentiality is therefore an active attempt by the researcher to remove any trace of the participants' identities from the records (Jamison, 2007:1-2; Maree & Van der Westhuizen, 2007: 41-42). During this study the participants were informed that the interviews would be audio-recorded, but that I would make sure that the names of the schools and respondents were not recorded. By destroying the tapes and the transcripts of the interviews immediately after the completion of the study confidentiality would be guaranteed. In line with this, participants were allowed to converse in their language of choice (e.g. English or Ikwerre) and once transcribed, everything was translated into English to also prevent the possible identification of participants or schools.

5.2.5 Trustworthiness

Four major factors are considered in establishing trustworthiness in a qualitative research study, and these are discussed below.

5.2.5.1 Credibility

Credibility is the fact that one can have confidence in your research findings, and that the findings show a true reflection of the subject under investigation (Denzin & Lincoln, in Bowen, 2005: 215; Guba & Lincoln, in Shenton, 2004:66-69; Lincoln & Guba, in Shenton, 2004:63). In this study, I used the directives given by Lincoln and Guba (in Creswell, 2007:202-209). The following tactics help to ensure honesty in informants when contributing data: prolonged engagements in the field, frequent debriefing sessions, peer scrutiny sessions, and member checks (Guba and Lincoln in Shenton, 2004: 68). Participants were allowed to either be part or refuse to be part

of the study in order to ensure that the data would only be from those willing to participate (this tactic helps to ensure honesty in informants when contributing data). Given that I conducted interviews at the schools and the UBE board offices, I spent a substantial time in the field (prolonged engagement in the field). There were frequent debriefing sessions during which I interacted with my supervisor to give me direction and comment on the way forward with regard to the progress made. I used member checks by allowing the participants to read through the transcripts as well as the findings obtained so far. This helped to enhance the credibility of the findings in that those participants who felt as if I misinterpreted them at some point could give clarification. I attempted to give as much information on the study as possible (thick description of the phenomenon under study).

5.2.5.2 Transferability, dependability and confirmability

Some researchers like Merriam (in Shenton, 2004: 69) and Patton (in Shenton, 2004:72) have argued that these three factors are not easy to establish in a qualitative study, as qualitative projects are often specific to a small number of particular environments and individuals (Shenton, 2004: 69). This may cause a hindrance in establishing transferability and affect trustworthiness in qualitative research. However, it is still possible to attend to them. Bowen (2005: 216) explains that transferability means that other researchers can apply the findings (anticipated “thick” description) of the study to their own research projects. If the need arises, the detail that I have provided in the findings of my study could be made transferable.

Although it is difficult to meet the dependability criterion which is defined by Bowen (2005:216) as “the stability of the findings over time”, one should try to enable a future researcher to repeat the study, according to Shenton (2004: 63). For that reason I include as much information about the setting and the participants as possible, without providing information that would identify the individuals or the schools.

Confirmability refers to the internal coherence of the data in relation to the findings, interpretations, and recommendations (Denzin and Lincoln in Bowen, 2005: 216). Furthermore, researchers must take steps to demonstrate that findings emerged from the data and were not generated by the researchers themselves (Shenton, 2004:63).

I will make use of all of the above as suggested by several researchers to ensure trustworthiness in my study.

5.2.6 Data presentation and analysis

Data analysis is a body of methods that **inter alia** helps to describe information, detect patterns and develop explanations (Joel, 1996: 1). Data analysis is a systematic search for meaning and a way to process qualitative data so that what has been learned can be communicated to others (Hatch in Leech and Onwuegbuzie, 2007:564). Data must be organised and interrogated in such a manner that the researcher can see patterns, identify themes, discover relationships and develop explanations (Leech & Onwuegbuzie, 2007:564).

In this study data was collected in the form of words by means of semi-structured interviews. O’Leary (2005: 12) states that the methods and logic of qualitative data analysis involves uncovering and discovering themes that run through raw data, and interpreting the implications of those themes for research questions. In this study I will subsequently present and analyse data by employing themes that emerge from the collected data so as to reveal those themes alluded to by the authors above. The first question posed to the UBE stakeholders with respect to implementation was “how far do you think the UBE free and compulsory education has been implemented?” The response to this question will give clarity regarding the level at which the policy has been implemented. The second question posed to the participants was “what are the consequence of the extent of implementation of free and compulsory education in Nigeria?”

5.3 FINDINGS

Although some progress has been made in Nigeria with regard to the implementation of UBE, the implementation itself has not been without problems. Findings from the interviews show the level at which the policy has been implemented. Some of the problems encountered relate to, *inter alia*, funding, teaching material and resources, environment conducive to teaching and learning, school fees, the population increase, drop-outs, funding, lunch for children, the students, and implementation. These and other issues which emerged during the interviews are discussed below.

5.3.1 Staffing

What emerged from the interviews with the UBE stakeholders was that schools are experiencing staff shortages and this poses a challenge to the implementation of the UBE policy (*we are lacking teachers; we don't have enough teachers*). The shortage of staff is attributed to the fact that many teachers and staff members are retiring, and because government is not really recruiting staff, staff shortages are experienced (*we want his Excellency [the governor] to be fast in the recruitment of teachers so that other schools will have teachers*). There is a specific need for well-qualified teachers (*we need qualified teachers that are professionals*). There also seem to be a shortage of support staff (*not only teachers, non-academic staff is also needed*).

A concern raised in relation to staff was staff discipline. It was acknowledged that there is amongst lack of discipline among some staff members (*because some of them are not up and doing*), although it seems as if this problem is being addressed. One participant explained that the *school based management committee, that is supervisors, will help discipline teachers, head teachers, principals and vices*.

The UBE policy places certain demands on staff members at schools, and some participants felt that the government are not doing what is needed to support them. Teachers and principals are not being incentivised through salaries and other benefits (*there is no incentive for principals of schools to even manage the school*), neither are they retrained through seminars or supported in other ways (*here is no re-training to teachers, giving them the new skill [sic], training them*). According to some participants, there also seems to be inconsistency as far as salaries are concerned between different states (*I know that in other states like Lagos or Sokoto ... most of the teachers there are well paid*).

Based on the above, I conclude that schools are experiencing staff shortages as well as a lack of discipline amongst some staff members, which may have a negative impact on the implementation of the UBE policy on free and compulsory education. There is need for the government to improve staffing and also to provide necessary staff incentives and benefits while tackling the issue of a lack of discipline in staff. This will enhance the adequate implementation of the UBE policy in the Rivers State

and in the broader Nigeria. The issue of teaching material and resources also came to the fore.

5.3.2 Teaching material and resources

It was recurrently mentioned during the interviews with UBE stakeholders that schools have a shortage of some basic teaching material and equipment like textbooks and chalk boards (*the students are not given adequate something they need for instance in terms of books, in terms of other facilities, government do not provide them*). Furthermore, some participants say that government has provided them with books that are not relevant to their scheme (*they supplied text books they were not relevant to the scheme that has been approved in the curriculum*).

In addition to these basic needs, some participants suggested that the government should support the schools more in terms of other equipment in view of the demands of the UBE policy. This includes laboratories, computers as well as good infrastructure. One participant explained:

When you come to the facilities that are required for the students, I mean to enhance learning, these things are not there. Computers, plus all the workshop that are needed for students to do their practicals - they are not there.

From the above it is clear that schools are experiencing a shortage of instructional material and resources to actualise the UBE free and compulsory education policy. People have high expectations of the government to provide them with relevant materials and all other resources for the effective implementation of UBE in the Rivers State. Linked to material and infrastructure is the issue of a conducive environment for teaching and learning.

5.3.3 Environment conducive to teaching and learning

It was clear from the interviews that the learning environment is not conducive to teaching and learning. It seems that something as basic as enough chairs for the students to sit on, is lacking (*the chairs are never enough for them to sit comfortably in the classroom*). It was specifically mentioned that the government needs to put up

new structures and renovate old buildings (*now the government has not made it, has not even thought of building or renovating our structure to make it very conducive for us to stay in*). At some schools there seems not to be enough classrooms (*the only thing I feel that is not enough, is the [classroom] accommodation*).

Furthermore, the participants were of the view that a lack of electricity and air conditioning leads to poor concentration of students and a lack of teacher commitment to the profession. One teacher explained:

The environment is not conducive for both the staff and the students. I'm talking about my school presently because you can see the environment, when it is hot, you just cannot find comfort any place here, you just want to drive out and go to town and get some peace. And with that kind of situation, you cannot coordinate because learning and teaching got to do with brain work and when the environment is not conducive, the students are lacking concentration. ...Then the teachers also complains about not having the attention of students, since they are not comfortable in the classroom, most of them are always found at the gate wanting to be allowed out of the school premises, even in their uniform.

There were opposing views in terms of the government's efforts to address the problem of infrastructure. Some participants suggested that the government is making progress in this regard (*because in the area of infrastructure, he [the governor] is handling it perfectly*), though many disagreed. They explained that the buildings are not up to standard (*the buildings are supposed to be of standard with computers and chairs*) and expressed their concerns that if the governor fails to complete most of the building projects during his term, it may be abandoned by the next governor (*some of the building which is under construction now, if he fails to complete it, I'm telling you that those things will be abandoned totally*).

Because the UBE policy allows every child of school age to go to school, government is expected to encourage the parents to send their children to school. Parents would expect a school environment conducive for learning in terms of its provision of standard buildings and enough classrooms to accommodate enrolled pupil. From the above it was understood that the infrastructure in the schools to not promote teaching

and learning. The government is evidently failing to provide enough chairs, electricity, air conditioning, accommodation, laboratories and computers. The above lack of infrastructure to promote and support teaching and learning is exacerbated by increased student numbers.

5.3.4 Increased enrolment figures

From interviewing the UBE stakeholders, it emerged that the schools are experiencing an increase in their student numbers and this is resulting from the fact that education is now provided free of charge. Large numbers of individuals now come and enrol in schools (*so because of the opportunity given to people, to the public to come to school, you see that the population of the school has greatly increased and is really affecting the classroom situation*). Although the policy suggests a lower ratio (*if you establish primary or a junior secondary school, the ratio is 30 students to one teacher*) the reality is not in line with this (*we are more than fifty which is not supposed to be according to the goal which has been set for this UBE system*).

From the above, it is clear that schools have had an increase in the number of students who enrolled, and this results in overcrowded classrooms. The government is therefore expected to provide more buildings (cf. 5.3.3) in order to accommodate every individual with the suggested student-teacher ratio. The drop-out rate in schools was also further explored.

5.3.5 Drop-outs and its effect

It emerged from the interviews that the schools experience drop-outs (*they will have some drop-outs in the schools*). This gives rise to poor economic growth (*in fact the economy will not grow because there will be a lot of drop-outs*). Furthermore, it is believed that many of the drop-outs join a militant group (Islamic rebel group) called “Boko haram”:

There will be a lot of militancy i.e. rebel group, the children will now grow into looking for what to do instead of following things ideally so we now have some problems along the line. You will see most people running up

to become Boko haram and that is what we are now experiencing in this nation. It's as a result of decision of these drop-outs

This poses a challenge to the implementation of the UBE policy. The government should improve on its implementation strategy to encourage and support those who had left school for whatever reason to return to school or to open other pathways to education. This will help to improve Nigeria's economy and better the education system.

From the above, it would seem that if the government improves on its implementation, the drop-out rate may be reduced, which might at the same time reduce militancy in the country. The issue of funding will be explored next.

5.3.6 Funding

It seems that the government created specific expectations which the participants felt it is not living up to. The first of these is the provision of funds which covers the school fees of every student and allows them to be enrolled in school, free of charge, as stipulated in the policy. The participants made it clear that schools are lacking the funds to manage their schools and to implement the UBE policy (*but the fund for these things is not there so that is a major problem*). Even the salaries and other benefit of teachers are not always paid (*the security men locked the pupils and the teachers out due to non-payment*). This negatively impacts on the commitment of teachers and non-academic staff (*the gazette in term of the salary is down, making the mind of the teachers to reduce and as a result the programme is not doing very well in the state*). Most participants suggested that this is posing a challenge to the smooth implementation of UBE in the Rivers State and in Nigeria.

Another issue that was raised was that some participants think the policy is a means through which the government is enriching itself, which is not to the advantage of the students and the nation (*I look at the system as a policy government has introduced as a medium to maybe appropriate fund to themselves*).

The pressure on schools due to funding issues is frustrating and has the potential to negatively affect the relationship between the schools and the department of

education, as it leads to distrust. A lack of funds leads to schools charging school fees, as will be discussed next.

5.3.7 School fees

During the interviews it was observed that schools are necessitated to charge school fees because they are not provided with sufficient resources by the government to run the school (*they are virtually paying something because sometimes they are made to tax themselves, the students I'm talking about now are made to provide certain things and then the principals also are made to source for funds*). Some participants went ahead to say that education in Nigeria is free in theory and not in practice. For instance, the one participant exclaimed:

So government have only announced that education is free but in theory and not in practice. It is not free because some schools are collecting money just to run the school affairs, like the registration of West African Examination Council (WAEC), principals are collecting money and these children have to go round to struggle to ensure that they pay school fees.

While most participants were negative about the school fee issue, others said that the government has made education free in Nigeria (*actually the Nigerian government has made UBE compulsory in this nation and they have made it free*). Some participants are of the opinion that government should allow parents to sponsor some aspects of their children's education for effective implementation of UBE:

The project is a kind of a gigantic one. It's a very big project so it will be difficult for the government alone to shoulder. Therefore the parents should be allowed to have a hand to some extent or to some level, while the government will now carry the rest.

While the UBE policy states that education is free, government is expected to implement this by providing all resources and finances needed to effectively actualise it. This will enable principals to effectively run the schools without asking anything from the students. Schools seem to lack the resources and finances for smooth

management and this is hampering the implementation of the UBE policy. While the government is encouraged to provide the schools with sufficient resources, the possibility to partner with parents support should be considered.

5.3.8 Lunch for students

Another aspect that is directly linked with funding is lunch for the students. It was argued by the participants that the government failed to keep its promise of providing the students with food (*by the standard and policy of UBE, there are supposed to be free food for the children - three square meal as they said. We have not really been having all those things since the inception of the UBE*). They expect the government to provide free food for the students so that hunger does not pose a challenge to the implementation of the UBE policy (*they said the children are supposed to be fed three times a day*).

The provision of meals for the students is vital because it helps them to concentrate in class, enabling the UBE policy to succeed. The consequence of non-provision of funds is that the students are not getting food at school.

5.3.9 Student motivation

Another aspect that emerged from the interviews was that some teachers are experiencing a lack of student attention (*then the teachers also complain about not having the attention of students*). This, some participants probably feel, is because the government has not met the demand of more comfortable school structures (*we need accommodation because the students are many*). A participant stated that *the teachers also complain about not having the attention of students, and it discourages them because the students, since they are not comfortable in the classroom, most of them are always found at the gate wanting to be allowed out of the school premises*.

It was also suggested that some parents do not send their children to school as they rather to use their children in the labour market (*at the end of the day, parents prefer wanting to use that child as you know, labour market, child labour, all those ones you see along the street*).

It seems that there are specific factors that hamper student motivation, such as the learning environment (also see 5.3.3) and pressure from parents to rather earn money in the labour market.

5.3.10 Official support

It also emerged from the interviews that there is no adequate supervision of UBE staff by supervisors. This has a negative effect on teachers who do not deliver what is expected of them (*even though our supervisors go and supervise but much is expected from them*). For the UBE programme to be successful there should be regular and effective monitoring by supervisors as it puts a check on the teachers.

5.3.11 Level of implementation

Participants had varying views on the level of implementation. Some participants felt that the government has not really implemented the UBE free and compulsory education policy (*actually, the UBE free education policy has not truly been implemented here; Nothing has been done! They have not really implemented anything because so many things they promised to do in UBE section, they are not really doing it*). Some participants pointed out that for the period they have been with UBE, free education has not been a reality (*the truth is that it has not been implemented because, government said free and compulsory primary education for UBE, but from my experience, about seven-eight years now, it has not meet up to its demands*).

There were also views that the implementation so far is partial:

So the implementation has been like very partial in my school and on parts of community they just take care of those things in parts. It is supposed to be in rounds, its suppose to go round because they say it's compulsory, you know, free and compulsory, but then it's not free in all ramifications, that is what it is.

Although some were quite positive (*I can say that the policy has been quite well implemented*) one participant said that only a few selected schools are actually benefitting:

If you come to Rivers State here, [you will] discover that the free and compulsory education are done to few selected schools, especially those schools on the road where if the president is passing or other governors or visitors are passing, they can see that these schools are modern and they are good schools but if you live somewhere else it is a different thing.

Although the policy is regarded as a good idea, it was argued that if it is not adequately implemented it will adversely affect the students and the country as a whole in terms of development (*but to the nation, if the policy is not properly implemented, it will affect our development*).

From the above, it is acknowledged that although the government has some specific expectations to meet in terms of implementing the UBE free and compulsory education policy, most of the participants felt that these expectations have not been met.

The findings from the interviews with the UBE stakeholders in relation to the interview questions were discussed. The findings on the consequences of the extent of implementation of free and compulsory education in the Rivers State in Nigeria will be discussed below.

5.4 DISCUSSION

The staff members of any organisation are the workforce of that organisation and their role is essential. In the context of the UBE policy it is crucial for the government to employ a sufficient number of teachers in order to meet the needs regarding UBE implementation. The data showed that this is not the case (5.3.1). Furthermore, it is critical to engage professionally trained and competent teachers to achieve quality educational output. Teacher shortages have numerous consequences on any educational system as it stands in the way of the education goals being met. Teachers also need to be better supported by trained officials (5.3.10).

While the government is expected to equip the schools with laboratories, computers, and relevant books, findings from the interviews have indicated that teaching materials and other resources are lacking (5.3.2). As a consequence the quality of

teaching and learning is affected negatively. If textbooks are not relevant, and if the required equipment is not available, it makes the teaching of a set curriculum a challenge.

From the interviews I found that the school environment is not conducive for teaching and learning (5.3.3). A inviting learning environment is important for both staff and students because it enables both parties to concentrate on the academic content. The environment in most of the schools are however not conducive for learning. The buildings are not always in good shape, there is a shortage of classrooms in some schools and specialised classrooms such as science and computer laboratories are lacking. Hot and stuffy classrooms demotivate both the learners and the teachers.

Following the announcement by government that education is free, there was an increase in enrolment. While this is a positive trend, the infrastructure seems to not be sufficient to cater for all these students (5.3.4). Overcrowded classrooms cause challenges for both teachers and students.

During the interviews I learned that there is an increase in school drop-outs (5.3.4). There could be a number of reasons for this which needs to be explored in a follow-up study. A concern is that the students who drop out then become militants and start fighting against the government. Ways to open other pathways for these students to complete their education should be explored.

It became clear that the government is not providing schools with sufficient funding to adequately implement the UBE policy. Teachers' salaries are not even paid regularly (5.3.6). This negatively impacts on the teachers' morale and commitment. The availability of funds is essential, as finances remain a focal point in the development of not only the necessary infrastructure to improve education, but also in the operationalisation of any educational programme like UBE. Quality education cannot be achieved without finances, and for UBE to be successful and achieve its goal; the government has to distribute more funds.

As a result of inadequate funding, schools tend to require certain fees to be paid by students and their parents (5.3.7). The government must not only provide adequate

funds to the schools, but also abolish the payment of school fees in all Nigerian schools, not just in theory but also in practice. This will allow all children, including the less privileged, to get an education.

Other deductions from this research have shown that schools have not been provided with food for the children (5.3.8). The shortage of free meals for the students has several implications, including the students' inability to pay attention to the teachers, and this negatively impacts on their education. Other aspects that contribute to poor concentration and a lack of motivation seem to be a lack of comfortable classrooms (5.3.3) and economic pressures on students to earn money (5.3.9).

Finally, it seems that the UBE policy is really only partially implemented, and not equally implemented in all schools (5.3.11). It was argued that this has a negative impact on the nation as a whole, as development is influenced by education.

5.5 CONCLUSION

In this chapter the view of UBE stakeholders on the consequences of the extent of implementation of UBE free and compulsory education was explored. This was done through semi-structured interviews conducted with one principal, one vice-principal and five teachers from each of the four selected schools in Obio/Akpo and Ikwerre LGA,, as well as three UBE board officials. While progress has been made in some areas, it can be concluded that the government seems to have failed in its responsibility of providing basic resources, funds and support to implement the UBE policy. This hinders the realisation of free and compulsory education in Nigeria.

In the next chapter, the findings of the different chapters will be presented.

CHAPTER 6: SUMMARY AND FINAL COMMENTS

6.1 INTRODUCTION

In Nigeria, basic education has been identified as the basis of life-long learning, literacy for the masses, and adult education (1.1). It is assumed that an adequate provision of basic education will serve to further develop human and capital resources in the country. In order to bring about free and compulsory education, the UBE policy was introduced by the Federal Government in 1999. However, poor implementation of the policy has been observed for several years after its launching (4.1) and in order to comment on the state of free and compulsory education in Nigeria, it is necessary to determine the consequences of the extent of its implementation. The aim of this study was therefore to explore the consequences of the extent of the implementation of free and compulsory education in Nigeria. Framed within a transformative paradigm and qualified by a mixed-method approach, the following steps were taken to achieve the aim of the study:

In Chapter 2, literature was reviewed to describe free and compulsory education in three African countries, namely Malawi, Uganda, and Kenya. The aim of this literature review was to gain an understanding of the state of and problems related to free and compulsory education in these countries. The information gained from the review is considered important, as it helped to provide a background to an understanding of the implementation of free and compulsory education elsewhere in Africa. Also, the insights drawn from the literature review were supportive and informative for the analysis of the Nigerian policies undertaken in Chapter 3.

The aim of Chapter 3 was to analyse both the *Universal Basic Education Policy* of 1999 and the *Rivers State Universal Basic Education Law* of 2005. By means of a context and a content analysis, an understanding was gained of the implications of the implementation of free and compulsory education in Nigeria in general, and in the Rivers State in particular. The policy analysis was used to compile questionnaires and develop interview questions to explore and determine the extent of the implementation of free and compulsory education.

Based on the information gained through the policy analysis, questionnaires were compiled to assist in determining the extent to which the UBE policy is implemented in a selection of Nigerian schools. By means of a survey the realities regarding implementation as experienced by teachers, principals (including vice-principals), parents and students, were explored in four schools in the Rivers State. Following the survey results, the focus in Chapter 5 was placed on a further determination of the extent of implementation through semi-structured interviews.

Following the aforementioned steps, the focus of this chapter will be to summarise and comment on my research findings, and to indicate the consequences of the extent of the implementation of free and compulsory education in Nigeria.

6.2 SUMMARY OF FINDINGS AND CONSEQUENCES

This section deals with the findings of my research regarding the implications of the consequences of the extent to which free and compulsory education has been implemented in four selected schools in the Rivers State. Following the survey and subsequent interviews conducted in this study, the following themes regarding policy implementation surfaced: education as a human right, teaching materials/resources, funding, teacher/staff, school fees; and a conducive learning environment. These themes are considered as important as they can be regarded as evaluation “tools” in the assessment of policy implementation. Issues regarding each of these themes will therefore be presented by elaborating on the importance of each theme in relationship to free and compulsory basic education in Nigeria. I will end each discussion of a theme with conclusions regarding its consequences for free and compulsory education.

6.2.1 *Education as a human right*

Education is a human right, and as this right is significant in assisting children to achieve their optimum potential in life, basic education should be made available to all children (1.1). In addition, it has also been indicated that education is the best guarantee in promoting sustainable economic and social development. Hence, any government that wants to build a strong nation must invest in education.

In Nigeria, the government's commitment to ensure education as a basic right can be noticed on two accounts: firstly the government has adopted the conventions of the Jomtien Declaration which, *inter alia*, supports "commonly accepted humanistic values and human rights" (2.5.1); and secondly, Section 2 of the UBE policy not only reaffirms the right of a child to compulsory, free universal basic education, but coincides with Section 18(3) of the *1999 Constitution of the Federal Republic of Nigeria* (3.3.2.1) which states that the government shall provide free, compulsory and universal primary education, free universal education, and free adult literacy programmes. It is therefore clear that the Nigerian government is indeed committed to promote and protect education as a basic human right.

Additionally, in the survey, the students, teachers, school principals, and parents were asked whether the students' right to basic education is upheld. The respondents indicated that the children's right to equal education is indeed upheld (4.3.2). The interviewees also confirmed that the right to basic education is upheld in Nigeria (5.3.4). The affirming of basic education as a human right invariably implies that both the *Universal Basic Education Policy 1999*, and the *Rivers State Universal Basic Education Law 2005* are based on the recognition and the acceptance of this right.

With regard to education as a human right, I can subsequently state that Nigeria has, on the one hand, committed itself to promoting education as a human right on paper - that is as a signatory to the Jomtien Declaration, and through the inclusion of this right in the *1999 Constitution of the Federal Republic of Nigeria*, in the *Universal Basic Education Policy 1999*, as well as in the *Rivers State Universal Basic Education Law 2005* (3.1) On the other hand, this commitment is also realised in practice through policy implementation (3.2). As a consequence, it can be stated that the acquisition of free and compulsory basic education in Nigeria in general, and the Rivers State in particular, gained significant ground with the upholding of this human right as core and foundational in the actualisation of free and compulsory basic education. The protection and promotion of education as a basic right subsequently implies not only a guaranteed growth in the acquisition of basic education in the present, but serves as a pillar for future success in the development of Nigerian basic education.

6.2.2 Teaching materials and resources

Instructional materials are not only essential tools for effective teaching and learning, but their availability can also help to raise the morale of teachers and pupils (2.4.1.7). It can therefore be assumed that the absence of teaching materials and resources will not only impede on effective teaching and learning, but will also hamper educational growth (2.5.2.5). The assumption is that the governments of nations must ensure that teaching materials are provided and distributed to schools in order to realise an adequate implementation of free and compulsory education in their countries. Contrary to this assumption, the review of literature in three African countries namely Kenya, Uganda and Malawi, showed that a lack of provision of instructional materials not only hampered the growth of UPE in these countries, but affected the implementation of their UPE programmes, including the realisation of the MGD goal 2 which focuses on ensuring that all children have access to and complete a full course of primary schooling (2.5.2.5; 2.4.1.7; 2.3.1.4).

The analysis of the UBE policy in this study revealed that Nigeria is faced with challenges such as uneven quality of education and limited resources to provide free and good quality education for all (3.3.1.1). This state of affairs is further confirmed by the *Rivers State Universal Basic Education Law 2005* (3.3.2.3). When drawing from both policies, it is clear that whilst services in public primary and junior secondary schools should be free of charge, adequate funding is required to make free and compulsory universal basic education available. As such and in order to provide quality basic education, sufficient teaching materials and other necessary resources are subsequently expected to be made available by both the Nigerian and Rivers State governments. Hence, these governments must commit themselves to such provision. Contrary to these expectations, however, the survey indicated that all stakeholders involved in this research expressed dissatisfaction with the low provision of teaching materials and other resources necessary for teaching and learning in a selection of Nigerian public primary and junior secondary schools in the Rivers State (4.3.2). This finding was also similar to the outcome of the interviews where the participants indicated that schools were lacking some basic teaching materials like textbooks, chairs, computers, laboratories, etc. (5.3.3). These findings call for deep reflection and attention by the government, especially in the light of the

government's commitment to uphold basic education as a human right. This perceived commitment is, by implication, only realisable if the required teaching and learning materials are supplied. As mentioned, the lack of teaching and learning materials as depicted in this study is also a problem experienced by the other African countries reviewed. It can be stated that the consequence of this is that the acquisition of free and compulsory education by the Nigerian nation, and the other African nations, is rendered problematic. The effective implementation of UBE free and compulsory education is not fully realisable without the sufficient provision of teaching and learning resources. Consequently, the aim of the Jomtien Declaration on EFA (2.2.1) is threatened, particularly in the Rivers State of Nigeria where this study was conducted.

6.2.3 Funding

Funds are crucial for the implementation of any educational policy, especially when considering the need for funds to purchase study materials, to build classrooms and to pay the salaries of both academic and non-academic staff (2.4.1.5). Thus, to make free and compulsory education possible in Nigeria in general, and in the Rivers State in particular, the necessary funding is required for educational purposes. The literature review in this study found that the introduction of free and compulsory education in Kenya led to an increased budgetary allocation to education (2.5.2.4). In spite of this increase, however, there is still a need for more funds as the initial funds could not adequately meet the increasing demands (2.5.2.4). In a similar manner, the introduction of UBE also brought about an increased funding allocation, though not adequate in Malawi and Uganda, which led to subsequent challenges regarding the funding of education in these countries (2.3.2; 2.4.1.5). In order to address the problem of adequate funding, the government of Uganda introduced a financial initiative to build more classrooms and to complete those not yet completed (2.4.1.5), while the Malawian government received support from donor agencies (2.3.1.4).

With regard to Nigeria, the policy analysis revealed that the financing of free and compulsory education is recognised and stipulated in Section 11(1) of the UBE policy (3.3.2.4). It is in particular stated that UBE shall be financed by the federal government block grants, of which no less than 2% of it is Consolidated Revenue

Fund. This stipulation was also found to be in tandem with the *Rivers State Universal Basic Education Law 2005* according to which the financing of UBE must be a combined responsibility of the federal, state and local governments, with a large percentage coming from the state government (3.4.2.4c). It is subsequently clear from the policy analysis that the Nigerian government is committed to make free and compulsory education available to all Nigerians. However, there is often a gap between policy on paper and policy in practice. In the case of the four schools in the Rivers State taking part in this study, parents, teachers and school principals indicated that the UBE programme is poorly funded (4.3.2). Similarly, the interviewees also confirmed that schools lack adequate funds to properly implement the UBE policy (5.3.6). Adequate funding is required for the effective implementation of free and compulsory education, and the consequence of inadequate funding is not only poor policy implementation, but also poor educational outcomes (4.3.2; 5.3.6). Whilst the lack of funds feeds into the poor provisioning of teaching materials (6.2.2), it also limits the provisioning of quality education - without the necessary finances, the goals of the UBE policy cannot be successfully achieved. Thus, although the government is committed to make free and compulsory education a reality for all Nigerian children, this noble commitment remains far from fully implemented. In reality, problems related to the provision of teaching material and resources, and a lack of funding, hold grave consequences for policy implementation. In essence, the promotion of basic education as a human right is to a certain extent violated and the expectations of the Jomtien Declaration on EFA, of which Nigeria is a signatory, may not be realised.

6.2.4 Teachers and staff

The role of teachers in education is not only important, but of extreme significance when considering that they are responsible for transmitting knowledge, values and skills to students (2.5.2.3). They are indeed the bedrock of any educational programme because they put policy statements into action. Thus, without properly trained and qualified teachers, any educational programme which teachers serve, is likely to fumble. It has been said that in the absence of the basic skills and knowledge required to survive in society, children may end up becoming street children and militants (5.3.5). The shortage of teachers in any school system

subsequently holds several implications, such as the inability of teachers to pay quality attention to students, an increase in the pupil-teacher ratio, and an inability to adequately translate policy statements into action (2.5.2.3). Thus, without enough qualified teachers, it not only becomes very difficult to transmit the necessary knowledge, values and skills, but the realisation of the Jomtien goal of basic quality education for children, youths and adults, is hampered (2.2).

In the literature review of this study, it was shown that the introduction of UBE in Malawi was not only followed by an increase in student enrolment, but also by a shortage of qualified teachers (2.3.1.5). As a result, the Malawian government was prompted to not only recruit more teachers, but to provide additional in-service training in order to meet the increased demand for qualified teachers (2.3.1). Despite these actions, Malawi still struggles to sufficiently tackle the challenge of a teacher shortage (2.3.2). In a similar manner, Uganda also experiences a teacher shortage, and to address this challenge they introduced The Teacher Development and Management System (2.4.1.1; 2.4.1.2). Similarly, Kenya also experienced an increase of student enrolment and a subsequent shortage of qualified teachers (2.5.1.1; 2.5.1.3; 2.5.2.3).

Although the policy analysis of the UBE policy and the Rivers State UBE law indicated various directions for policy implementation, the potential shortage of teachers was not anticipated and there is no mention of possible ways to address such a shortage. This silence in the policies is particularly disturbing as both policies are premised on the notion that the introduction of the free and compulsory education programme would definitely lead to an increase in student enrolments (2.4.1.1). It thus seems that the potential teacher shortage was not foreseen as an unintended policy consequence, and no contingency plans were put in place to address it.

The survey done in this study affirms that teachers are convinced that the available teachers have the ability to provide quality education (4.3.2). It is assumed that this response probably signifies the availability of qualified teachers to adequately implement quality free and compulsory basic education. However, the interviews with stakeholders indicated that the profession is indeed confronted with a teacher shortage as a result of the increased number of students since the introduction of

free and compulsory education (5.3.1). This poses a significant threat to effective teaching as a shortage of teachers will negatively impact on the teacher-student ratio, and will also lead to overcrowded classrooms in an attempt to maximise the utilisation of the available teachers. By implication, the concentration of both students and teachers in class will be affected, as teachers' ability to carefully attend to individual students will be limited. Another anticipated consequence is poor student performance. The overall consequence of the problematic implementation of free and compulsory basic education is the defeat of the general aim of UBE, but also an impediment on the realisation of the goals of Jomtien Declaration on EFA. Another consequence of the partial policy implementation is that the government of Nigeria must not only train and re-train teachers, but should also give serious attention to the recruitment of more teachers in order to address the teacher shortage, and to ensure the provision of quality education.

6.2.5 School fees

Although there seems to be a commitment to education as a human right, as previously discussed (6.2.1), I can comment at this stage that the implementation of free and compulsory education in the Rivers State is riddled with various problems. Problems such as a lack of teaching material and resources (5.3.2), a lack of funding (5.3.6) and the teacher shortage (5.3.2) have consequences for the availability of basic education, and also for the quality of the education on offer.

Another theme that comes to the fore when considering the implementation of free and compulsory education is that of school fees. The non-payment of school fees in public primary and junior secondary schools is clearly stipulated in Section 3(1) of the UBE policy, and it is also in tandem with Section 1(1) of the Rivers State Law (3.3.2.1; 3.4.2.4a). It is subsequently expected that the government should uphold the non-payment of school fees as stipulated in the policies by abolishing any form of payment in schools. The assumption further exists that in order to enable the non-payment of school fees the government must ensure adequate funding. The insufficient funding of the UBE programme (6.2.3) leads to various implementation problems, such as the inability of schools to function without adequate funding. Whilst school fees are a source of income, the non-payment of school fees can indeed be problematic for schools which do not receive adequate funding.

Although the policies clearly indicate that basic education must be free and compulsory, one could expect that the increase in student enrolment (2.5.2.2) placed an enormous fiscal pressure on the government. In this regard, my research findings reveal the tension between policy on paper and policy in practice. The parents and guardians who participated in the survey indicated that they are still required by schools to pay school fees for their children and wards (4.3.2). In response to the survey question, “In line with the UBE policy, the parents are in no way required to pay school fess or have school-related expenses”, the respondents overwhelmingly affirmed that they were still expected to pay school fees (5.3.7). This state of affairs was further corroborated during the interviews when parents answered in the affirmative that they still have to pay school fees for their children (5.3.4). In addition, findings also showed that parents are not only required to pay school fees, but they are also expected to pay for other services such as, *inter alia*, school uniforms, sports and examinations (4.3.2; 5.3.7). The payment of school fees not only contradicts the vision of free education for all Nigeria children, but it also makes it difficult for children from poor families to acquire basic education.

Contrary to the above finding, the teachers were neutral on the matter of payment of school fees, while the school principals disagreed with the parents and students, stating that the payment of school fees and other related charges were not required (4.3.2). The possibility exists that school principals, being the administrative heads of the schools, may not have been entirely forthcoming on the real state of this issue as they have a clear understanding of the policy directives regarding not only non-payment, but also with regard to the associated punishment for violators (FMoE, 1999a: Section 3(2)). The neutrality of the teachers further strengthens this argument, along with the fact that the school principals expressed their dissatisfaction with the poor funding of schools (4.3.2).

It subsequently appears that the implementation of free and compulsory education in the four schools in the Rivers State is hampered by a lack of funding on the one hand and the subsequent need to charge fees on the other hand. These two issues indeed go hand-in-hand – it is only by means of adequate funding that free and compulsory education can be made available in the true sense of the word, i.e., really *free* education. The lack of sufficient funds seems to lead to a whole chain of grave

consequences. Insufficient funding not only impacts on the provision of teaching material and resources, thus on the quality of education, but also on the everyday running of the education sector. As schools have difficulty in providing good quality education through sound policy implementation, they seem to be unofficially forced to ask parents and guardians to pay certain fees, even if this contravenes policy directives. A further consequence of this problematic implementation is that some parents may not be able to enrol their children as they cannot afford the fees. Thus, once again, whilst the commitment to provide free and compulsory basic education to all Nigerians is on paper, the realisation of free and compulsory education is in practice confronted by certain realities.

6.2.6 Conducive learning environment

Drawing from the above, it can be inferred that the establishment of a conducive learning environment is problematic. The condition of the environment in which teaching and learning takes place is crucial because it determines the concentration levels of both teachers and students (2.3.1.3). A conducive learning environment requires sufficient teaching and learning materials, adequate funding and enough qualified teachers. In the schools in which this study was undertaken, the learning environment was hampered by a lack of teaching materials, by inadequate funding and by a shortage of teachers. By implication, and in order to adequately implement UBE free and compulsory education, serious attention needs to be paid to the mentioned issues in order to enable a conducive learning environment.

In the literature review it came to the fore that the provision of a conducive learning environment is often hampered by overcrowded schools in Malawi (2.3.1.3), in Uganda (2.4.1.1) and in Kenya (2.5.2.2). Whilst the Malawian government had to introduce a double shift to solve the problem of a lack of classrooms, similar problems were addressed in Uganda (2.4.1.1) and Kenya (2.5.1.1) through the construction of classrooms to improve the pupils to classroom ratio. One could assume that these countries experienced difficulties in establishing conducive learning environments for their pupils. Findings in this research also reveal that the learning environment in which free and compulsory education is provided is not always conducive to teaching and learning. This was indicated by the students, teachers and school principals who perceive the learning environment at their

schools as not conducive for teaching and learning (4.3.2). The interviews further corroborated this finding when the participants stated that there is no conducive teaching and learning environments due to, *inter alia*, a lack of sufficient classrooms (5.3.3). The absence of a conducive teaching and learning environment can be related to poor funding, a shortage of teachers and inadequate teaching and learning materials, as already depicted in this study. By implication, one could assume that poor concentration by students and a lack of motivation by the teachers are some of consequences of this state of affairs. As a further consequence, the implementation of the UBE policy is problematic. The acquisition of basic education as a human right is threatened and the goal of Jomtien is not fully actualised.

In sum it can be stated that in spite of the commitment to basic education as a human right in Nigeria (6.2.1), several findings in this research depicted problems that impede on the effective implementation of the UBE free and compulsory education in the Rivers State. The issues foregrounded by the participants of this study included inadequate teaching materials/resources, poor funding, teacher shortages, payment of school fees and a non-conducive learning environment. Drawing from the findings of this study, I conclude that the UBE policy has been poorly implemented in the four selected schools in the Rivers States. The overall consequence of the extent of the poor policy implementation is that the provision of *truly* free and compulsory basic education, of good quality, has been rendered vulnerable.

In conclusion I want to make the following final comments which arose from this study:

- Adequate funding is required for the effective implementation of the UBE programme, as good quality education cannot be achieved without funds. The provision of adequate funding remains the responsibility of the government, who is, in the last instance, accountable for policy implementation.
- More classrooms need to be erected in order to address the increase of student enrolment in order to accommodate every child. Attention to this need is vital for the realisation of the UBE objective to provide free and compulsory education to all Nigerian children.

- The government needs to ensure that the necessary teaching materials are purchased and distributed to not only assist in the availability of free and compulsory education, but to contribute to the provision of basic education of good quality.
- In order to address an existing shortage of teachers, attention should be given to the recruitment and training of teachers.
- The right of the female child to free and compulsory education, as stipulated in the UBE policy, should in particular be upheld by the government.
- All barriers to education, including the charging of school fees, should be identified and removed so as to ensure that every child has an equal right to attend school.
- Appropriate legislation and subsequent implementation towards this should be enacted and supervised.
- A monitoring and evaluation system should be set up by the government to continuously monitor the implementation of the UBE programme. Regular report backs to the government could be very useful in identifying problems and those areas that urgently need attention for successful policy implementation.

6.3 STRENGTHS, WEAKNESSES AND AREAS FOR FURTHER RESEARCH

In the undertaking of my research I have encountered some strengths and realised some weaknesses that could be associated with this study. It is important to highlight the strengths of a study as I am convinced that such strengths contribute to and influence the outcome of a study. Also, it is important to indicate the weaknesses of a study as they can point to topics for future research.

6.3.1 *Strengths and challenges*

The use of a mixed method research design can be regarded as one of the strengths of the study as it assisted in generating both quantitative and qualitative information on the same subject matter, namely the extend of the implementation of free and compulsory education. The generation of both quantitative and qualitative data strengthened the research outcome. In addition, the compilation of four questionnaires, one each for students, parents, teachers and school principals, can

also be regarded as a strength in the sense that it enabled me to get different views regarding the research theme.

One of the challenges faced during the course of my study was the rejection or refusal by a vice principal from entering her particular school. Although I had permission from the UBE board stating that this particular school is one of the assigned schools to be used in my study, the UBE board had to phone the school leadership to confirm their permission. The retrieval of the questionnaires after completion also posed a challenge. I had to visit the schools many times in order to assemble the distributed questionnaires, often to be told that some participants forgot them at home. I also experienced challenges in trying to retrieve the exact number of questionnaires distributed, as some participants said they forgot it at home. In the end I did not succeed in retrieving all the questionnaires, but I did retrieve enough to proceed with the research.

6.3.2 Suggestions for further research

The overall aim of this study was to determine the consequences of the extent of implementation of the UBE free and compulsory education policy in four selected schools in the Rivers State in Nigeria. For the purposes of this particular study, the focus was placed on Part 1 and Part 2 of the UBE policy. Although I deemed these sections of the policy relevant for this study, due to time and other constraints I was unable to investigate other complex issues pertaining to the implementation and improvement of existing educational policies. Areas pertaining to the content and quality of teaching in relation to policy implementation were omitted and should be considered as an area for further research. This study also did not pay attention to aspects like the establishment and membership of the UBE Board, the role of policy-makers in the formulation of the policy guidelines for the successful operation of the UBE programme in the federation, and the prescription of minimum standards for basic education. I think these aspects should also be considered for further research as they could shed more light on the extent of and problems related to the implementation of free and compulsory education in Nigeria.

In addition, this study was carried out in only one state out of the thirty six states in Nigeria. It is recommended that the extent of policy implementation should also be

undertaken in other Nigerian states so as to obtain a broader perceptive on the extent of the implementation of UBE policy in Nigeria at large. Finally, research should be undertaken to determine the nature of the educational outcomes produced by policy implementation as this will be useful in subsequent policy evaluation and policy revising.

6.4 CONCLUSION

As stated from the onset, this study was primarily focused on investigating the extent of the implementation of the UBE free and compulsory education policy in four selected schools in the Rivers States. In order to achieve this aim, a literature review helped to describe free and compulsory education from an African perspective, a policy analysis of the UBE policy and the *Rivers State Education Law* assisted in generating an understanding of the directives for the implementation of free and compulsory education in Nigeria, while the empirical research helped to determine the realities experienced by teachers, principals, parents and students, and explored the consequences of the extent of implementation of free and compulsory education.

The Nigerian government's commitment to uphold basic education as a human right is noble and the willingness of the government to make free and compulsory education available to all Nigerian children should be acknowledged. However, policy implementation is never straightforward and in order to continuously improve on policy outcomes, policy-makers should always be willing to assess and re-assess the implementation of free and compulsory education in Nigeria.

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SUMMARY

Framed within a transformative paradigm and qualified by a mixed-method approach, this study was aimed to comment on the consequences of the extent of the implementation of free and compulsory education in four selected schools in the Rivers State in Nigeria. In order to achieve the aim of the study and to gain an African perspective on free and compulsory education in Africa, a literature review was undertaken of universal basic education in Malawi, Uganda, and Kenya. The review pointed to various implementation problems experienced by these countries, such as a lack of funding to implement UBE and a shortage of teachers to deal with the increased enrolment since the introduction of free basic education. The literature review was followed by a policy analysis of both the context and the content of the *Universal Basic Education Policy* (1999) and the *Rivers State Universal Basic Education Law* (2005). Based on the policy analysis, questionnaires were compiled and distributed to school principals, teachers, parents and students. A survey was subsequently used to establish the realities the respondents experience with regard to the implementation of free and compulsory education. The analysis of data revealed some positive aspects regarding policy implementation, such as the upholding of basic education as a human right, increased access to education on primary and secondary level for Nigerian children, the ability of teachers to provide assistance and satisfaction with the level of supervision and monitoring of policy implementation. However, some problems with regard to policy implementation came to the fore and included, inter alia, inadequate funding, overcrowded classrooms, a lack of teaching materials and the payment of school fees. The survey was followed by data generation through semi-structured interviews. The aim of the interview were to comment on the consequences of the extent of implementation of free and compulsory education. The findings from the interviews corroborated the existence of problems related to policy implementation, such as a staff shortage, a lack of teaching materials and resources, no conducive teaching and learning environment and insufficient funding. In conclusion it can be stated that the implementation of free and compulsory education in the Rivers State is problematic. It is problematic in the sense that it hampers the effective provision of UBE, but it is also problematic in the

sense that its consequences impact on the quality of education and on the realisation of education that is truly free for all Nigerian children.

ADDENDA

6.5 Addendum A: EXAMPLE OF INFORMED CONSENT LETTER

04 March 2013

Researcher: Mrs Alikor Oroma
No 44 Evo Road
G.R.A
Port- Harcourt
oromaalikor@yahoo.com
+2348032577372

Dear Parent

INFORMED CONSENT: PARTICIPATION IN STUDENT SURVEY

I am a Master's student in Education Policy Studies, focusing on the level of implementation of the UBE policy in our country. I would like to request you and your child to assist me with this project in which I aim to explain the realities regarding access to free education in Nigeria. Both you and your child will merely be asked to respond to a number of questions on separate survey questionnaires. You should not identify yourselves in any way on the questionnaires. This will ensure that your participation is completely anonymous. Once you have responded to the questions, it should be sealed with the sticker that I provide, and returned to the school. All the responses from all the participants will be combined before the data is analysed, and no school or individual will be identifiable in the research report. I want to assure you that the information provided will be kept confidential. The participants will not be harmed in any way. If you want to refrain from responding to a particular question, you are free to do so.

If you agree to participate please sign this consent form to allow your child to complete the questionnaire. Participation is voluntary. I do, however, need the views of people in order to understand the realities of this important issue, and will appreciate your contribution.

Thank you in advance

Yours faithfully

Mrs Alikor Oroma

Please complete and return this page. Keep the accompanying letter for future reference.

I hereby give permission for my child to take part in the survey.

Name of parent/ guardian:

.....

Contact number:

.....

Name of the learner:

.....

Class: Age:

Parent/ guardian signature:

.....

Date:

6.6 Addendum B: PRINCIPAL QUESTIONNAIRE

THE IMPLEMENTATION OF THE UBE POLICY

Thank you for allowing the survey to take place at your school. I want to remind you that ALL our analyses are kept confidential. Please do not write your name or the name of your school on this form. Respond to the questions by marking it X in the solid block provided or fill in the response where required, for example

Which country do you live in?	Nigeria	1
	Kenya	2

For the purpose of the study, we need a few details about you and your school.

1. What is your gender?	Female	1
	Male	2

2. Number of years as a teacher (including your years as a principal):	Up to a year	1
	2- 3 years	2
	4- 5 years	3
	6- 10 years	4
	11- 20 years	5
	More than 20	6

3. Number of years as a principal and/or deputy principal:	Up to a year	1
	2- 3 years	2
	4- 5 years	3
	6- 10 years	4
	11- 20 years	5
	More than 20	6

4. How many students are enrolled at the school this year (approximately)?	
--	--

5. How many teachers do you have on your staff (including you)?	
6. How much school fees do you charge per student per year?	
7. Is your school a model school?	
8. Please describe your school in a few lines.	
9. In which state does your school fall in?	

Please read the following statements, and indicate your views on each using the following scale:

1 – Strongly disagree

2 – Disagree

3 – Neutral

4 – Agree

5 – Strongly agree

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
10. In Nigeria education is a human right that is granted to all.	1	2	3	4	5
11. Education in Nigeria allows the citizens to transmit and enrich common cultural and moral values.	1	2	3	4	5
12. In Nigeria children have access to primary education.	1	2	3	4	5
13. In Nigeria children have access to secondary education.	1	2	3	4	5
14. Girls have equal access to basic education than boys.	1	2	3	4	5
15. Basic learning needs of children, youths and adults are met in Nigeria.	1	2	3	4	5

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
16. The roles and responsibilities of all the role players in the implementation of the UBE policy are clear.	1	2	3	4	5
17. The state agencies responsible to implement the UBE policy have enough high quality personnel.	1	2	3	4	5
18. Local government agencies responsible to implement the UBE policy have enough high quality personnel.	1	2	3	4	5
19. Education in Nigeria lays the foundation for life-long learning and human development.	1	2	3	4	5
20. Social factors affect the implementation of the UBE policy.	1	2	3	4	5
21. Economic factors affect the implementation of the UBE policy.	1	2	3	4	5
22. Political factors affect the implementation of the UBE policy	1	2	3	4	5
23. During 9 years of UBE, students acquire appropriate levels of literacy.	1	2	3	4	5
24. During 9 years of UBE, students acquire appropriate levels of numeracy.	1	2	3	4	5
25. During 9 years of UBE, students acquire appropriate levels of communication.	1	2	3	4	5
26. During 9 years of UBE, students acquire appropriate levels of manipulative and life skills.	1	2	3	4	5
27. At the end of 9 years of UBE, students are employable.	1	2	3	4	5
28. During 9 years of UBE, students acquire appropriate knowledge and skills useful to themselves and the society at large.	1	2	3	4	5
29. During 9 years of UBE, students acquire appropriate levels of relevant ethical, moral and civic skills.	1	2	3	4	5
30. UBE contributes to eradicating illiteracy.	1	2	3	4	5
31. UBE contributes to eradicating poverty.	1	2	3	4	5
32. UBE contributes to eradicating ignorance.	1	2	3	4	5
33. UBE brings education to marginalized groups in the Nigerian society.	1	2	3	4	5
34. Transition from primary education to secondary education is ensured through UBE.	1	2	3	4	5
35. UBE provides free education for all students up to the age of 15.	1	2	3	4	5
36. UBE develops commitment for education in the community.	1	2	3	4	5
37. The rate of drop-outs has lowered since the introduction of UBE.	1	2	3	4	5
38. UBE supports dropouts to complete their education.	1	2	3	4	5
39. Adult literacy programmes are available in our community.	1	2	3	4	5
40. The adult literacy programmes are free.	1	2	3	4	5
41. Teachers are able to help various types of learners to be successful in school.	1	2	3	4	5
42. At our school, we have enough high quality teachers.	1	2	3	4	5

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
43. In our school, there are resources to implement the UBE policy.	1	2	3	4	5
44. Our school requires students to pay school fees.	1	2	3	4	5
45. Our school requires students to pay admission fees.	1	2	3	4	5
46. Our school is adequately funded.	1	2	3	4	5
47. Our school environment is conducive to learning.	1	2	3	4	5
48. There are constant standards in education in Nigeria.	1	2	3	4	5
49. Nigerian schools provide quality education.	1	2	3	4	5
50. There are provision and maintenance of infrastructural facilities such as buildings and equipment.	1	2	3	4	5
51. Adequate funding is made available to the principal for the day to day running of our school.	1	2	3	4	5
52. Instructional materials such as textbooks are provided by the UBE Board.	1	2	3	4	5
53. Teachers regularly receive their salaries.	1	2	3	4	5
54. The number of UBE qualified teachers is adequate compared to the number of students.	1	2	3	4	5
55. There's recruitment of qualified teachers by government.	1	2	3	4	5
56. The UBE schools are regularly supervised and monitored.	1	2	3	4	5

THANK YOU VERY MUCH

6.7 Addendum C: TEACHER QUESTIONNAIRE

THE IMPLEMENTATION OF THE UBE POLICY

Dear teacher

I am busy with research on the implementation of the UBE policy, and I request that you take the time to respond to the questions that are asked in this survey questionnaire. **PLEASE DO NOT WRITE YOUR NAME OR THE NAME OF YOUR SCHOOL ON THIS FORM. Once you have completed the questionnaire, please fold the questionnaire and seal it with the sticker provided.** This will ensure that your response will not be made known to anyone in your school. Responses from ALL the teachers from all the schools taking part in the survey will be added together, so no individual or school will be identifiable in the research report.

Please respond to these questions by writing in the solid block or marking it with X in the solid block next to the question, e.g.

Which country do you live in?	Nigeria	1
	Kenya	2

For the purpose of the study, we need a few details about you.

57. What is your gender?	Female	1
	Male	2

58. Number of years as a teacher :	Up to a year	1
	2- 3 years	2
	4- 5 years	3
	6- 10 years	4
	11- 20 years	5
	More than 20	6

59. What is your highest qualification?	
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Please read the following statements, and indicate your views on each using the following scale:

1 – Strongly disagree

2 – Disagree

3 – Neutral

4 – Agree

5 – Strongly agree

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
60. In Nigeria education is a human right that is granted to all.	1	2	3	4	5
61. Education in Nigeria allows the citizens to transmit and enrich common cultural and moral values.	1	2	3	4	5
62. In Nigeria children have access to primary education.	1	2	3	4	5
63. In Nigeria children have access to secondary education.	1	2	3	4	5
64. Girls have equally access to basic education than boys.	1	2	3	4	5
65. Basic learning needs of children, youths and adults are met in Nigeria.	1	2	3	4	5
66. Teachers are well informed about the UBS policy.					
67. The roles and responsibilities of all the role players in the implementation of the UBE policy are clear.	1	2	3	4	5
68. The state agencies responsible to implement the UBE policy have enough high quality personnel.	1	2	3	4	5
69. Local government agencies responsible to implement the UBE policy have enough high quality personnel.	1	2	3	4	5
70. Education in Nigeria lays the foundation for life-long learning and human development.	1	2	3	4	5
71. Social factors affect the implementation of the UBE policy.	1	2	3	4	5
72. Economic factors affect the implementation of the UBE policy.	1	2	3	4	5
73. Political factors affect the implementation of the UBE policy	1	2	3	4	5
74. During 9 years of UBE, students acquire appropriate levels of literacy.	1	2	3	4	5
75. During 9 years of UBE, students acquire appropriate levels of numeracy.	1	2	3	4	5
76. During 9 years of UBE, students acquire appropriate levels of communication.	1	2	3	4	5
77. During 9 years of UBE, students acquire appropriate levels of manipulative and life skills.	1	2	3	4	5

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
78. At the end of 9 years of UBE, students are employable.	1	2	3	4	5
79. During 9 years of UBE, students acquire appropriate knowledge and skills useful to themselves and the society at large.	1	2	3	4	5
80. During 9 years of UBE, students acquire appropriate levels of relevant ethical, moral and civic skills.	1	2	3	4	5
81. Education in Nigeria lays the foundation for life-long learning and human development.	1	2	3	4	5
82. UBE contributes to eradicating illiteracy.	1	2	3	4	5
83. UBE contributes to eradicating poverty.	1	2	3	4	5
84. UBE contributes to eradicating ignorance.	1	2	3	4	5
85. UBE brings education to marginalized groups in the Nigerian society.	1	2	3	4	5
86. Transition from primary education to secondary education is ensured through UBE.	1	2	3	4	5
87. UBE provides free education for all students up to the age of 15.	1	2	3	4	5
88. UBE develops commitment for education in the community.	1	2	3	4	5
89. The rate of drop-outs has lowered since the introduction of UBE.	1	2	3	4	5
90. UBE supports dropouts to complete their education.	1	2	3	4	5
91. Adult literacy programmes are available in our community.	1	2	3	4	5
92. The adult literacy programmes are free.	1	2	3	4	5
93. Teachers are able to help various types of learners to be successful in school.	1	2	3	4	5
94. At our school, we have enough high quality teachers.	1	2	3	4	5
95. In our school, there are resources to implement the UBE policy.	1	2	3	4	5
96. Our school requires students to pay school fees.	1	2	3	4	5
97. Our school requires students to pay admission fees.	1	2	3	4	5
98. Our school is adequately funded.	1	2	3	4	5
99. Our school environment is conducive to learning.	1	2	3	4	5
100. There are constant/uniform standards in education in Nigeria.	1	2	3	4	5
101. Nigerian schools provide quality education.	1	2	3	4	5
102. There are provision and maintenance of infrastructural facilities such as buildings and equipment.	1	2	3	4	5
103. Adequate funding is made available to the principal for the day to day running of our school.	1	2	3	4	5
104. Instructional materials such as textbooks are provided by the UBE Board.	1	2	3	4	5
105. Teachers regularly receive their salaries.	1	2	3	4	5
106. The number of UBE qualified teachers is adequate compared to the number of students.	1	2	3	4	5

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
107. The government recruits qualified teachers.	1	2	3	4	5
108. The UBE schools are regularly supervised and monitored.	1	2	3	4	5
109. The teachers at my school are qualified.	1	2	3	4	5
110. There is training and re-training of UBE teachers.	1	2	3	4	5
111. Instructional materials and other teaching aids are adequately supplied	1	2	3	4	5
112. There is adequate supervision of UBE teachers.	1	2	3	4	5
113. The teacher-to-student ratio in our classes is satisfactory.	1	2	3	4	5
114. Our classrooms have enough space for the learners and teachers.	1	2	3	4	5
115. There are sufficient numbers of chairs and desks in my class.	1	2	3	4	5
116. The UBE policy is well implemented.	1	2	3	4	5
117. Comfortable offices/staff rooms are provided for teachers.	1	2	3	4	5
118. Students are not required to pay fees before they are admitted into the school.	1	2	3	4	5
119. At my school, teachers are punctual.	1	2	3	4	5
120. The teachers come to school regularly.	1	2	3	4	5
121. There is sufficient furniture for both teachers and students.	1	2	3	4	5
122. Our classrooms are overcrowded.	1	2	3	4	5

THANK YOU FOR TAKING PART IN THE SURVEY. I REALLY APPRECIATE IT.

6.8 Addendum D: PARENT QUESTIONNAIRE

THE IMPLEMENTATION OF THE UBE POLICY

Dear parent

I am busy with research on the realities of students to get access to education, and I request that you take the time to respond to the questions that are asked in this survey questionnaire. **PLEASE DO NOT WRITE YOUR NAME OR THE NAME OF YOUR CHILD'S SCHOOL ON THIS FORM. Once you have completed the questionnaire, please fold the questionnaire, seal it with the sticker provided and send it back to the school.** Responses from ALL the parents from all the schools taking part in the survey will be added together, so no individual or school will be identifiable in the research report. **Please respond to these questions by writing in the solid block or marking it with X in the solid block next to the question, e.g.**

Which country do you live in?	Nigeria	1
	Kenya	2

For the purpose of the study, we need a few details about you.

123. What is your gender?	Female	1
	Male	2

124. How many children do you have?	Only one	1
	Two	2
	Three	3
	Four or more	4

125. How would you describe the employment situation of you and your spouse (e.g. <i>one of us is employed full-time and the other unemployed</i>)?	
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Please read the following statements, and indicate your views on each using the following scale:

1 – Strongly disagree

2 – Disagree

3 – Neutral

4 – Agree

5 – Strongly agree

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
126. In Nigeria education is a human right that is granted to all.	1	2	3	4	5
127. Education in Nigeria allows the citizens to transmit and enrich common cultural and moral values.	1	2	3	4	5
128. In Nigeria children have access to primary education.	1	2	3	4	5
129. In Nigeria children have access to secondary education.	1	2	3	4	5
130. Girls have equally access to basic education than boys.	1	2	3	4	5
131. Basic learning needs of children, youths and adults are met in Nigeria.	1	2	3	4	5
132. Education in Nigeria lays the foundation for life-long learning and human development.	1	2	3	4	5
133. During 9 years of UBE, students acquire appropriate levels of literacy.	1	2	3	4	5
134. During 9 years of UBE, students acquire appropriate levels of numeracy.	1	2	3	4	5
135. During 9 years of UBE, students acquire appropriate levels of communication.	1	2	3	4	5
136. During 9 years of UBE, students acquire appropriate levels of life skills.	1	2	3	4	5
137. At the end of 9 years of UBE, students are employable.	1	2	3	4	5
138. During 9 years of UBE, students acquire appropriate knowledge and skills useful to themselves and the society at large.	1	2	3	4	5
139. During 9 years of UBE, students acquire appropriate levels of relevant ethical, moral and civic skills.	1	2	3	4	5
140. Education in Nigeria lays the foundation for life-long learning and human development.	1	2	3	4	5
141. Transition from primary education to secondary education is ensured.	1	2	3	4	5
142. The education system provides free education for all students up to the age of 15.	1	2	3	4	5
143. The education system develops commitment for education in the community.	1	2	3	4	5
144. The education system supports dropouts to complete their education.	1	2	3	4	5
145. Adult literacy programmes are available in our community.	1	2	3	4	5

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
146. The adult literacy programmes are free.	1	2	3	4	5
147. The teachers at my child's school are able to help various types of learners to be successful in school.	1	2	3	4	5
148. At our school we have enough high quality teachers.	1	2	3	4	5
149. I am required to pay school fees for my child.	1	2	3	4	5
150. I am required to pay admission fees for my child.	1	2	3	4	5
151. I am required to buy textbooks for my child.	1	2	3	4	5
152. I am required to buy exercise books for my child.	1	2	3	4	5
153. I am required to buy the school uniform.	1	2	3	4	5
154. Our school environment is conducive to learning.	1	2	3	4	5
155. There are constant standards in education in Nigeria.	1	2	3	4	5
156. Nigerian schools provide quality education.	1	2	3	4	5
157. Paying school fees for my children's tuition is a burden.	1	2	3	4	5
158. Students who do not pay the required fees are refused access to schools.	1	2	3	4	5
159. It is my duty to ensure that my child receives basic education.	1	2	3	4	5
160. There's provision and maintenance of infrastructural facilities such as buildings and equipment at the school.	1	2	3	4	5

THANK YOU FOR TAKING PART IN THE SURVEY. I TRULY APPRECIATE IT.

6.9 Addendum E: STUDENT QUESTIONNAIRE

THE IMPLEMENTATION OF THE UBE POLICY

Dear student

I am busy with research on the realities of students to get access to education, and I request that you take the time to respond to the questions that are asked in this survey questionnaire. **PLEASE DO NOT WRITE YOUR NAME OR THE NAME OF YOUR SCHOOL ON THIS FORM. Once you have completed the questionnaire, please fold the questionnaire and seal it with the sticker provided.** This will ensure that your response will not be made known to anyone in your school. Responses from ALL the students from all the schools taking part in the survey will be added together, so no individual or school will be identifiable in the research report.

Please respond to the questions by writing in the solid block or marking it with X in the solid block next to the question, e.g.

Which country do you live in?	Nigeria	1
	Kenia	2

For the sake of this study, we need a few details about you.

161. What is your gender?	Female	1
	Male	2

162. What is your current class?	JSS1	1
	JSS2	2
	JSS3	3

163. How old are you (completed years)?	
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Please read the following statements, and indicate your views on each using the following scale:

1 – I strongly disagree

2 – I disagree

3 – Neutral

4 –I agree

5 –I strongly agree

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
164. Education is a human right that is available to all in Nigeria.	1	2	3	4	5
165. Children have access to primary education in Nigeria.	1	2	3	4	5
166. Children have access to secondary education in Nigeria.	1	2	3	4	5
167. Girls have equally access to basic education than boys.	1	2	3	4	5
168. Basic learning needs of children, youths and adults are met in Nigeria.	1	2	3	4	5
169. Teachers are able to help various types of learners to be successful in our school.	1	2	3	4	5
170. Our school requires students to pay school fees.	1	2	3	4	5
171. Our school requires students to pay admission fees.	1	2	3	4	5
172. Our school environment is conducive to learning.	1	2	3	4	5
173. There are constant standards in education across Nigeria.	1	2	3	4	5
174. Nigerian schools provide quality education.	1	2	3	4	5
175. We do not pay for books; we receive them for free.	1	2	3	4	5
176. In my school, uniforms are given free of charge.	1	2	3	4	5
177. We have good teachers in our school.	1	2	3	4	5
178. There are enough chairs and desks for us to sit and learn.	1	2	3	4	5
179. We are not more than 40 people in my class.	1	2	3	4	5
180. Computers are provided for us to learn with.	1	2	3	4	5
181. We have good facilities at school.	1	2	3	4	5
182. Our teachers regularly go on strike because their salaries are not paid.	1	2	3	4	5
183. In my school learners participate to make important decisions.	1	2	3	4	5
184. Supervisors from the UBE Board visit my school.	1	2	3	4	5
185. In my school we have enough classrooms.	1	2	3	4	5
186. We get send home if we do not pay our school fees.	1	2	3	4	5
187. I attend school regularly.	1	2	3	4	5
188. My parents allow me to come to school every day.	1	2	3	4	5
189. I do not pay school fees or any other charges.	1	2	3	4	5
190. Students who are not able to pay school fees are victimised.	1	2	3	4	5

THANK YOU VERY MUCH FOR TAKING PART IN THIS SURVEY.

FOLD THIS QUESTIONNAIRE AND SEAL IT WITH THE STICKER, BEFORE RETURNING IT TO THE SCHOOL.