

Table 3: Average number of pupils sharing one textbook

S/N	Subject	Lower Basic	Middle Basic	Upper Basic
1	English	3	4	3
2	Mathematics	3	3	5
3	Science	3	3	6
4	Social Studies	3	3	N/A

Note: Social Studies was not taught at the Upper Basic, therefore it was not applicable.

Lower Basic ranged from Grade 1-4 while Middle Basic ranged from Grade 5-7 and Upper Basic consisted of Grade 8-9

4.3 Care for Educational Materials

The study revealed that during storage, there were a number of measures that schools put in place to ensure that EMs were being looked after.

Schools mostly used offices of the headteacher, deputy headteacher and senior teacher as storerooms. The headteacher's office therefore, played a pivotal role in the management of EMs. However, further inquiry revealed that schools lacked instruments for monitoring proper use and record of EMs.

EMs were charged for the lost items

The MoE (1997: 4) Standards and Evaluation Guidelines stipulates some of the requirements for safeguarding EMs in schools as :-

- i) Availability of a stores ledger for the school;
- ii) Availability of at least 1 stores ledger in each department;

- iii) Availability of at least 1 stores ledger per class;
- iv) Availability of reading and borrowing records for teachers and pupils;
- v) Availability of safety rules displayed in storerooms;
- vi) Availability of monitoring use and care of materials.

A review of management systems showed that schools were using hard cover note books for EMs records. The stores function was given as an added responsibility to any of the teachers. With regard to the safety of EMs from the storeroom to class for use by pupils, 35 teachers (35.7%) said that it was the responsibility of the class monitors (class head pupils) to take care of the EMs. Sensitization on good practices formed a major management system of protecting EMs while in use by pupils. The study revealed that 54 teachers (55.1%) said advocacy of good practices was a strategy of ensuring that EMs were looked after by pupils.

The study showed that during lessons, class monitors were responsible for issuing and collecting the EMs. This was done by way of undertaking stock taking EMs before and after use. The study revealed that pupils who lost EMs were charged for the lost items.

4.4 Distribution of EMs

The study revealed that the distribution of EMs to schools (end users) was one of the major problems affecting schools in Mongu District. Sixty -eight teachers (69.4%) said EMs were not being distributed on time. Teachers attributed this to the following factors:

- i) Most schools were in remote parts of the district, hence information dissemination regarding availability of EMs at distribution centres (e.g zonal centres, DEBS' offices) was difficult;
- ii) Transportation of limited quantities of EMs from distribution centres was expensive, hence schools delayed in collecting such EMs;
- iii) Late release of funds meant to facilitate the distribution of EMs ;
- iv) Poor road network. This made some schools inaccessible in some seasons of the year.

The distribution was at a three-fold level. The first level was the distribution of EMs from the Ministry headquarters to the district office. The second level was the movement of EMs from the DEBS' office to the schools and finally, the internal distribution of EMs from the school storerooms to the classes. Along side the internal distribution, there was also the movement of EMs from one class to another. For instance some silozi readers were circulated amongst three class streams at Mupatu Basic School. This meant that pupils sometimes had to wait for the readers to be collected from the previous users before being used by the other class.

The associated problems with distribution of EMs as revealed by the study were:

- i) Tear and wear of EMs due to long distances from the MoE Headquarters to the districts;
- ii) Pilferage along the delivery chain;
- iii) Sending of a wrong consignment of EMs to wrong schools or district. This was common in the case of Zambia Language textbooks and Music books;
- iv) Late delivery of the Educational Materials;
- v) EMs sent by the MoE headquarters usually did not match with the enrolment figures. This made it difficult for the DEBS' office to work out the allocation to individual schools. The distribution from the MoE headquarters was just up to the district headquarters.

4.5 Teachers' Views on Educational Materials

Out of 98 teachers surveyed, 54 (55.1%) of the teachers indicated having adequate EMs while 44 (44.9%) said they did not have adequate EMs.

Details are presented in Table 4.

Table 4: Adequacy of EMs

S/N	Response	Frequency	%
1	EMs are adequate	54	55.1
2	EMs are not adequate	44	44.9
Total		98	100

Note: Fifty four teachers were of a view that EMs were adequate while forty four said EMs were not adequate

Further, it was revealed that the availability of EMs at the three basic levels (Lower, Middle and Upper) was different. For instance 22 teachers at the Lower Basic were of the opinion that EMs were adequate while 38 said EMs were not adequate. Thirty-eight (38) teachers did not teach the Lower Basic category. At the Middle Basic Level, the study revealed that the EMs were not adequate, a situation which made teaching and learning very difficult for both the teacher and the pupil. Nine teachers said EMs were adequate, while 49 said the EMs were not. Forty teachers did not teach this class category.

A similar situation prevailed at the Upper Basic Level as only 4 teachers were of the view that EMs were adequate, 50 felt that the required EMs for the effective teaching and learning were not adequate (Table 6). Forty four of the teachers did not teach the Upper Basic category.

**Table 5: Proportion of teachers who indicated availability of EMs
in eight subjects at Lower and Middle Basic**

S/N	Subject	Lower Basic		Middle Basic	
		Number of teachers	%	Number of teachers	%
1	Mathematics	11	39	9	45
2	English	7	25	7	35
3	Science	5	18	10	50
4	S/Studies	8	29	8	40
5	Silozi	9	32	5	25
6	Literacy	12	43	6	30
7	Library	5	18	4	20
8	Other	16	57	19	95

Notes:

- (i) Twenty (28) Teachers in lower and Twenty (20) teachers in middle basic classes responded to this question;
- (ii) **Other-** represents other subjects covering Computer Studies, Life Skill Materials, HIV/AIDS EMs and other students' requisites such as, pencils, rubbers, exercise books, rulers, syllabuses and Mathematical Sets.

Table 6: Proportion of teachers (out of a total of 20 teachers) who indicated availability of EMs in eight subjects at Upper Basic.

S/N	Subject	Number of teachers	%
1	Mathematics	5	22
2	English	4	17
3	Science	2	9
4	Geography	2	9
5	History	2	9
6	Civics	4	17
7	Library	2	9
8	Other	17	74

Note: *Other* represents other subjects covering Computer Studies, Life Skill Materials, HIV/AIDS EMs and other pupils' requisites like pencils, rubbers, exercise books, rulers, syllabuses and Mathematical Sets.

The survey showed that the majority of teachers were aware of the decentralized procurement of EMs. Out of 98 teachers surveyed, 74 teachers (75.5%) were aware that Educational Materials in their schools were procured through a decentralized system. However 20 teachers (20.4%) thought that it was the DEBS' office which provided the EMs to schools while 3 teachers (3.1%) indicated that they knew that it was the responsibility of

both the school and the DEBS’ office which presided over the EMs provision. A small proportion (1%) felt it was the Ministry Headquarters that made the provision to schools. Details are in Table 7 below:

**Table 7: Systems of providing Educational Materials to
Basic schools**

S/N	How are Educational Materials for your school provided?	Frequency	%
1	The school buys them	74	75.5
2	The District Education Board Secretary’s Office (DEBS) buys for schools	20	20.4
3	The Ministry of Education Headquarters provides	1	1.0
4	Both the school and the DEBS buys for schools	3	3.1
Total		98	100

Note: Seventy- four teachers said EMs were bought through decentralized system, 20 were of the view that EMs were bought by the District Education Board Secretary, 1 said EMs were bought through a centralized system and 3 said EMs were bought using both the decentralized and centralized systems.

Table 8: Views of teachers on the system of providing EMs

S/N	Which system of providing EMs to schools is the most effective?	Frequency	%
1	Decentralized System	50	51
2	Centralized System	48	49
Total		98	100

Note: Fifty teachers were in favour of the decentralized system while Forty eight teachers of the total were in favour of the centralized system.

Among the respondents, 50 (51%) of them indicated that the decentralized system was effective for the following reasons:

- i) EMs were getting to schools;
As teachers were responsible for selecting the required EMs and the purchasing process, suppliers of EMs were collaborating well with the schools and delivered the items to the schools once orders were in place without much difficulty;
- ii) EMs were bought on time;
The planning process was done at school level and therefore once funds were available, orders for EMs were made with the suppliers who were expected to supply within the required period.
- iii) Ownership of EMs was enhanced;

Under the decentralized procurement system, decisions and utilization of funds was done at school level, teachers made decisions on what EMs to buy. The EMs that schools bought were a product of teachers' effort and this way the resources were looked after as they formed part of the school.

- iv) EMs were ordered according to school needs;
Teachers took stock of what was lacking in their class categories prior to buying EMs. This way, there was neither over nor under supply.

The other 48 (49%) were however of the opinion that the system was not effective due to the following:

- i) That teachers were not consulted when deciding on EMs provisions;
The purchasing process of EMs was limited to a few people, a situation which disadvantaged other teachers. Schools should have a Selecting Committee responsible for EMs purchases. It was this Committee that should have consulted teachers about their needs in each class category.
- ii) That suppliers of EMs had no capacity;
Teachers stated that some of the EMs suppliers did not fulfill their contractual obligations in that the ordered EMs were supplied long after the expected supply period. Further, they did not have adequate transport to deliver to the schools. In this case the EMs

were left at the District Education Board Secretary's office for collection by the schools themselves.

- iii) Funds were not enough to meet the school needs;

Teachers said the funds for the procurement of Educational Materials were not enough to address the school needs. There were therefore very few quantities of the EMs purchased. This situation, they said, made it difficult for the EMs suppliers to reach their schools for very few orders.

- iv) That the curriculum was changed prior to availability of EMs;

Teachers raised a concern with regard to change of the curriculum. They said that new syllabuses were issued to them for implementation before EMs were available to support that. They were of the view that an orientation training of teachers in the new curriculum and availability of EMs should be in place before the actual implementation of the new curriculum.

Table 9: Views by teachers on the most preferred system of providing EMs

S/N	Which system of providing EMs to schools is the most effective?	Frequency	%
1	Decentralized System	50	51
2	Centralized System	48	49
Total		98	100

Note: Fifty respondents were in support of the decentralized system of EMs provision while forty-eight were in favour of the centralized system.

Since teachers were the direct users of the EMs, they were therefore in this case the best evaluators of the EMs at their disposal. Sixty-one (62.2%) of the respondents said they were satisfied with the EMs available. They were satisfied in the sense that the EMs were user friendly in that the content was adequate, they were gender friendly and embraced other learning areas like Life Skills and HIV/AIDS. However, 37 teachers (37.8%) said they did not like the EMs their schools had. They felt that some of the EMs available did not meet the standards of education. They cited poor binding of most textbooks and further mentioned that some of the textbooks did not adequately cover the curriculum content. Details are presented in Table 10 below:

Table 10: Views of teachers on the quality of EMs provided

S/N	Are EMs provided of the right type you would have preferred?	Frequency	%
1	Yes	61	62.2
2	No	37	37.8
Total		98	100

Sixty-one (62.2 %) teachers were of the view that the supplied EMs were of the right quality. However, thirty-seven (37.8%) felt that the EMs that were at their disposal were not the right ones. Ninety –eight (98) responded to the question.

Table 11: Views of teachers on possible solutions to address the EMs problems

S/N	Does your school have any solution to the non-availability of EMs?	Frequency	%
1	Yes	42	42.9
2	No	56	57.1
Total		98	100

Note: Forty-two (42.9%) teachers said they had solutions of addressing the EMs problems while fifty-six (57.1%) had no solutions.

The study revealed that only 42.9% (42 teachers out of 98) were of the view that the situation could be solved at school level. The suggested solutions were as presented in Table 12:

Table 12: Ways of addressing the EMs shortages

S/N	Suggested Solution	Frequency	%
1	Sector Fund Provision	33	33.7
2	Soliciting for more funding	1	1.0
3	Introduction of EMs Fund	2	2.0
4	Schools to improvise	2	2.0
5	Continuous EMs provision	4	4.1
6	Not Applicable	56	57.1
Total		98	100

Note: Forty-two (42.8%) teachers said EMs problems could be addressed and fifty-six (57.1%) were of the view that the schools did not have solutions to address the non- availability of EMs.

The study revealed that as a result of shortages of EMs, pupils were mostly given EMs during class work, a situation which contributed to poor performance of the pupils. Further, sixty (60) teachers (61.2%) felt that pupils were not satisfied with the amount of time that was allowed for them to use the EMs. Details are presented in Table 13.

Table 13: Pupils' satisfaction with time allotted to use EMs

S/N	Are pupils satisfied with time given to them to use EMs?	Frequency	%
1	Yes	38	38.8
2	No	60	61.2
Total		98	100

Note: Thirty-eight (38.8%) teachers were of the view that pupils were satisfied with the amount of time to use EMs while 60 (61.2%) felt pupils were not satisfied.

In a similar situation, seventy- two (73%) teachers were of the opinion that teachers had access to the EMs required for their lessons. It was further revealed that the EMs were kept in different places. For instance 31 teachers (31.6%) said they accessed their EMs from the school storeroom. Details are presented in Tables 14 and 15 below:

Table 14: Teachers' Access to EMs

S/N	Do you have access to the required EMs for your daily use?	Frequency	%
1	Yes	72	73.5
2	No	26	26.5
Total		98	100

Note: Seventy-two (72) teachers had access to EMs while twenty-six (26) said they did not have access to EMs.

Table 15: Stock Rooms for Educational Materials

S/N	Where do you get your teaching materials from?	Frequency	%
1	Head's office	16	16.3
2	Deputy headteacher's office	6	6.1
3	Senior Teacher's office	25	25.5
4	Storeroom	31	31.6
5	School Library	1	1.0
6	Head of Department	1	1.0
7	Not Applicable	18	18.4
Total		98	100

Note: There were different places where Educational Materials were kept. These comprised headteacher's, deputy headteacher's offices, senior teacher's office, school storeroom, School Library and departmental offices.

In other cases, the EMs were mainly kept in offices for the headteachers, deputy head or senior teacher respectively. Teachers revealed that EMs were kept in offices for the following reasons:-

- i) There was no provision of storerooms;
- ii) Classrooms were not secure to keep school EMs;
- iii) The Head teachers' offices were more secure.

Teachers pointed out that EMs were very important in the provision of quality basic education. They further observed that the availability of EMs was a motivating factor for both the pupil and the teacher. The teachers therefore recommended that:-

- i) The government should provide adequate EMs to basic schools through increased funding to basic schools;
- ii) The acquisition of EMs should be planned for properly in order to allow for coordinated distribution;
- iii) Schools should be provided with infrastructure to enable them to properly store EMs; and
- iv) All stakeholders should be sensitized about the importance of EMs.

4.6 Headteachers' views on Educational Materials

Ten (90.9%) headteachers out of 11 interviewed were of the view that the decentralized procurement of providing the EMs was working well.

With regard to funds, the study revealed that schools were receiving funds through the DEBS' office ranging from US\$234.02 to US\$3,510.44 (K1 million to K15 million) per quarter (every three months). The allocation was based on the enrolment figures of each school. This means that a school with more pupils received more funding than a small school with fewer pupils. Headteachers managing small schools observed that they could not embark on big and tangible projects with the limited financial resources received. They said that this disadvantaged them in many ways. For instance, they

observed that it did not make economic sense by spending half of the allocated funds for EMs on travel and meals to the Central Business District (CBD) and only to buy just a handful of the required EMs. The study further revealed that the funds were released very late; this made it difficult to implement the planned activities accordingly.

Headteachers were also of the view that government should increase funding towards the education sector if improvements were to be made. Eighty teachers (72.7%) were of the view that more funding should be allocated to schools

The study revealed that the EMs were still inadequate in most subject areas to an extent where there could just be a copy for the teacher. Seven headteachers (63.6%) felt that EMs were not adequate.

The study revealed that only 1 out of 11 headteachers had knowledge of the policy on EMs. With regard to the knowledge of the Ministry of Education (MoE) rating selection system (EMs are evaluated to determine their suitability and classified into categories), 3 of the 11 headteachers interviewed knew the system.

With regard to collaboration with other partners, headteachers were of the view that the main partner in the management of EMs was the Parent – Teacher Association (PTA). The headteachers further revealed that the kind

of collaboration was mainly in the use of EMs funds that schools might have received.

Regarding the issue of distribution, the headteachers explained that the distribution of EMs was in three (3) categories. There was distribution of EMs from the Ministry head office to the DEBS' offices. Secondly, EMs were distributed from the DEBS' office (those from MoE Headquarters and those bought by the DEBS) to schools. The EMs received in schools finally were to be distributed to pupils from the storerooms. Eight out of 11 (72%) headteachers revealed that at each point of distribution there were problems experienced. As illustrated in the tables below 16 and 17, three major problems were encountered. Firstly, there was the aspect of late delivery of EMs by the supplying office, transport problems, lack of storage and pilferage of EMs. Secondly, the EMs once delivered at the DEBS' office from the head office took quite some time before getting to schools.

Headteachers also indicated that the distribution of EMs to teachers and pupils for their daily use was also affected. The major problem was lack of storage facilities at the schools and pilferage of the EMs. In most cases EMs were kept in the headteacher's office and this inconvenienced both the teacher and the headteacher respectively. Further inspection of the storerooms revealed that schools were stocked with old EMs which had become outdated. These were not being utilized and instead consumed up space in the offices.

Table 16: Problems associated with the distribution of EMs from MoE Headquarters to schools

S/N	Problem identified	Number of headteachers citing it	%
1	Delayed distribution of EMs	7	63.63
2	Inadequate supplies	1	9.09
3	Pilferage	3	27.27
Total		11	100

Note: Out of eleven headteachers, seven (63.6%) were of the view that distribution of EMs was usually delayed, one (9%) felt that the quantities of materials were usually in inadequate supplies while three (27.2%) were of the view that there was room for pilferage of materials in the supply chain.

**Table 17a: Major problems cited by headteachers with regard
distribution and storage of EMs**

Distribution and storage of EMs from the DEBS to your school			
S/N	Problem identified	Number of headteachers citing it	%
1	Transport Problems	9	81.81
2	Delayed distribution	2	18.18
Total		11	100

Note: At DEBS level, nine (81.8%) headteachers felt that the major constraint was that of transport while two (2) said EMs were not distributed on time.

**Table 17b: Major problems cited by headteachers with regard
distribution and storage of EMs**

Distribution and storage of EMs from the storerooms to the classrooms			
S/N	Problem identified	Numbers of headteachers citing it	%
1	Lack of storage facilities	7	63.63
2	Pilferage of EMs	4	36.36
Total		11	100

Note: At school level, seven (63.6%) headteachers were of the view that there was a problem of non-availability of storerooms while four (36.3) headteachers felt that pilferage was a problem within the processes of storing and distribution of EMs.

With regard to training, the study revealed that 7 headteachers (63%) were of the opinion that teachers had received training in EMs management. This, they said was in line with the Ministry's decentralization policy.

In view of the above, the headteachers recommended that government should:-

- i) Increase funding to schools towards the procurement of EMs;
- ii) Improve the road network so as to improve accessibility to schools;
- iii) Allocate more funds towards the building of infrastructure in schools in order to improve storage of EMs;
- iv) Ensure that EMs are available prior to the introduction of a new curriculum.

4.7 Views of Ministry of Education Officials

Nine MoE officials who answered the questions were of the view that the supply of EMs to schools was not adequate. They substantiated their position by stating that the textbook to pupil ratio was still more than 1:3 in all schools instead of the required 1:2 ratio. With regard to policy, the study revealed that only 3 (33%) officials knew the policy on EMs. With regard to the implementation of the policy 8 (89%), stated that the responsibility of policy implementation was vested in the office of the DEBS.

All the 9 MoE officials stated that funds were disbursed directly to schools after calculating each school's allocation based on enrollment figures. Six (67%) officials said they had worked with Non Governmental Organizations and other government ministries in an effort to provide EMs to basic schools.

The study revealed that all the 9 MoE officials did not know their estimated budget and actual budget releases for the years 2004 and 2005.

Seven officials (77.8%) were of the view that it was difficult to provide schools with laboratory equipment and special education materials. They observed that these were not available with the local EMs suppliers. Further, it was revealed that 4 officers (44.4%) were satisfied with the services of EMs suppliers in the district. Similarly, the study showed that 4 (44.4%) knew the suppliers of EMs.

Further, 7 (77.8%) officials were of the view that EMs should be procured through a decentralized procurement system. The MoE officials were in favour of the decentralized procurement system because districts were able to choose the most preferred EMs in their basic schools.

Eight (89%) officials said poor distribution of EMs was one of the factors which contributed to the inadequacies of EMs in basic schools. They cited the major constraint as the non-availability of funds. Tables 18 and 19 show the respondents' opinions about the distribution of EMs. The officials explained that without funds it was not possible to address the factor of moving EMs from the DEBS' office to individual schools. The situation was even more pronounced for the far flung schools as this implied high distribution costs.

The study further revealed that storage of EMs could not be overlooked. At each point of the supply chain, there was need for storage facilities. The study revealed that only 4 (28%) out of the 14 selected schools had storerooms with adequate space. The rest used the headteachers’ offices to keep the EMs that the school might have received.

Table 18: Distribution as a factor in the provision of EMs

S/N	Is distribution of EMs a major problem affecting EMs provision?	Frequency	%
1	Yes	8	88.9
2	No	1	11.1
Total		9	100.0

Note: Out of 9 MoE officials, 8 accounted for those who felt that distribution was a factor of EMs provision and one headteacher was of the view that it was not.

Table 19: Major problems associated with the distribution of EMs

S/N	Response	Number of respondents citing it	%
1	Lack of storage facilities	1	11.1
2	Funds for distribution not available	4	44.4
3	Poor road infrastructure	3	33.3
4	Limited quantities	1	11.1
Total		9	100.0

Note: Nine MoE officials responded to the question and cited the problems associated with the distribution of EMs as illustrated in the table above.

In view of the above, the Ministry officials recommended that:-

- i) Funds for the procurement of EMs should be increased;
- ii) Schools and the community should continually be sensitized about the utilization and care of EMs;
- iii) The road network in the district should be improved.

4.8 Views of pupils on Educational Materials provision

A total of ninety pupils were surveyed. Out of these, 72 (80%) were of the view that EMs were not adequately provided in all the subjects. They revealed that the situation varied from one subject to another. They said, for instance, textbooks were provided in English, Environmental Science and Mathematics but this was not the case for other subjects like Social Studies, Religious Education and Silozi. They said that the number of textbooks were not enough to be issued out.

The pupils indicated that besides textbooks, teachers brought in other EMs like wall charts, maps, exercise books, pens and rulers. They however, mentioned that the supply of exercise books, pens and rulers was erratic. At the time of the study, pupils at Mupatu Basic school were last given exercise books in the previous year (2005).

The study further revealed that pupils were not satisfied with the quantities of EMs available to them. Pupils at Namushakende Basic School, for instance indicated that the book ratio for Social Studies and Religious Education was 1:6. A similar situation was prevalent in other selected schools.

Further, Pupils interviewed said they were not happy with the situation of sharing 1 textbook amongst 6 pupils. This adversely affected them in that, firstly, pupils were forced to squeeze themselves on one desk to share the book. Secondly, pupils had different learning abilities and thus sharing of

one textbook amongst 6 pupils disadvantaged slow learners. Thirdly, the life span of a textbook was reduced because the pulling apart by so many pupils at once accelerated the tear and wear of the EMs.

The study also revealed that pupils were allowed to borrow EMs from their teachers. However, pupils were not allowed to borrow EMs that were in fewer quantities for fear that the few that the school might have would be lost. Pupils lamented the non-availability of libraries because if all basic schools had libraries textbooks which were in fewer quantities would be made available to them in the library;

It was also clear from the study that there were no written guidelines about the management of EMs in the selected schools. However, pupils were sensitized verbally about the good practices as means of looking after their resources. All the 90 pupils interviewed revealed that they covered their textbooks at the beginning of each term. Additionally, pupils brought in cotton thread and needles to use to mend the carton boxes where EMs were kept once torn.

The study further revealed that teachers were in a tendency of not using all the available EMs at their disposal. Pupils revealed that they observed that there were textbooks which were not being used and they remained unused. The study revealed that these were kept for future use.

Further, the study revealed that pupils who lost school EMs were asked to replace such items. However, at the time of the study, there was no information from the selected schools about pupils losing and replacing EMs.

In view of the above, pupils recommended that to improve learning in schools:

- i) The government should provide schools with enough EMs;
- ii) Teachers should use all the EMs stock available instead of keeping them for future use;
- iii) Libraries should be set up in basic schools to promote the reading culture and facilitate borrowing of EMs by pupils wishing to study at home.

4.9 Views of parents on Educational Materials provision

During the study, 35 parents were interviewed. The interviews revealed that parents were aware of the value Educational Materials played in the education delivery system. They stated that EMs helped pupils to follow what was being taught and without EMs both pupils and teachers were under motivated and that the education system was of low standard.

Thirteen (37%) parents were of the view that pupils were given the essential EMs. However, 22 (69%) felt that the EMs were not adequate. Parents from Kaande and Namitome basic schools, for instance, said that their children were not given textbooks to use at home. Further, parents at Kaande basic

said that pupils promoted one of the local small scale traders as they frequented his small shop locally called "Kantemba" at break time to buy exercise books, pens and pencils. A situation which pointed to the fact that EMs provided by the school were not enough.

The study further revealed that parents were not involved in the decisions concerning the purchase of EMs. Further, parents in the PTAs were called for meetings at which school projects were discussed. However, only projects like construction of buildings and security for the schools were implemented and not acquisition of EMs. Participation in the acquisition of EMs purchase was limited to teachers and the office of the DEBS.

The 35 parents indicated that they were not required to provide EMs for their pupils. This, they said, was in line with the Free Education Policy (FEP) of the Government. According to the FEP the government provides 100% support to education in that pupils are provided with all the essentials like textbooks, exercise books and are not supposed to be levied any fees. Nevertheless, parents mentioned that despite the FEP in place, parents were still buying exercise books, pens and pencils for their children because schools were not giving pupils the required EMs regularly or as on demand.

In view of the above, parents recommended as follows:-

- i) The government should provide adequate funding to schools to enable them purchase sufficient EMs;

- ii) Schools be allowed to undertake fundraising ventures aimed at supplementing government efforts in the provision of EMs.

4.10 Views of Educational Materials suppliers

Eight (8) suppliers of EMs were interviewed. These suppliers indicated that EMs were a necessity in order for schools to offer quality education. They indicated that EMs provided direction and control for the pupils. In addition, EMs were a stimulant in arousing interest to both the learner and the teacher.

All the suppliers of EMs interviewed revealed that EMs were one of the major requirements in the education delivery system. They also supported the view that there was inadequate funding to basic schools for acquisition of EMs. They however indicated that the decentralized EMs procurement policy was an indication of goodwill and improvement in this area.

A further review of MoE documents revealed that a total of US\$68,449.99 (K292, 484,099) was disturbed in 2005 for the purchase of Grades 2 and 5 EMs and US\$47,859.35 (K204,501,114.38) in 2006 towards the procurement of Educational Materials for Grades 3 and 6. The disbursement was based on the enrolment figures available for Mongu District.

The 8 suppliers revealed that the availability of EMs in basic schools was still not satisfactory. In their opinion, the textbook to pupil ratio was ranging from 1:3 to 1:6 and that for supplementary readers and other EMs was either 1:5 or EMs were not available at all. Further, the EMs suppliers revealed that in some cases schools were getting an allocation of US\$117.01(K500,000.00) meant for textbook provision in three subjects for 200 pupils. Schools in such cases managed to purchase only 10 textbooks in a subject for a class.

The 8 suppliers were of the view that the system in place was good even though there were areas that required improvement. They said under the decentralized EMs procurement, all stakeholders played a role and that there was concerted effort which resulted in achieving the desired outcome. The EMs suppliers, however, were of the view that teachers and parents should be sensitized about the decentralized EMs procurement system and that the Ministry should strengthen the management styles at basic school level.

The suppliers further indicated that the policy on EMs was not fully understood by the teachers. For instance, EMs suppliers said that teachers did not understand the principle of having more than one course book in a subject because in the past there was only one approved textbook in such a subject.

The Educational Materials Suppliers recommended that:-

- i) The government should increase allocation of funds to schools to enable them acquire sufficient EMs;
- ii) The MoE should have a replenishment programme for EMs already available in schools;
- iii) The cost-sharing with parents be re-visited for example an introduction of a Textbook User Fee per year from parents. The Suppliers of EMs were of the view that parents should also contribute towards the provision of EMs. This could be done through a reasonable levy from parents. This way, there would be improvement in the flow of EMs unlike the situation where it was just the government that provided the school EMs;
- iv) There be established EMs buying period. There was a felt need by the EMs suppliers that it would be better to have a period when EMs should be bought. The buying process of EMs seemed to be taking place all year round, a situation which made it difficult for suppliers to coordinate the aspect of logistics;
- v) Policy makers should ensure that MoE policies and other related educational processes were disseminated to the teachers so that they would be aware of them and in such a way be able to implement them.

CHAPTER FIVE

DISCUSSION OF RESEARCH FINDINGS

5.1 The value of Educational Materials towards the learning process:

The study found that all the respondents attached great importance to the value of EMs. The majority of the respondents indicated that EMs provided pupils with more opportunities to learn because even when the teacher was absent, pupils could still learn. They observed that EMs enhanced pupils' abilities to learn skills like those of spelling and vocabulary. Hence they generally viewed EMs as inputs which promoted quality education. This view was similar to that of Rosenberg (2000:3) who viewed EMs as a catalyst for developing skills of locating, selecting, organizing, manipulation, analyzing, evaluating and presenting information. She added that without EMs, the education process failed to develop beyond the acquisition of the most basic knowledge and became the mechanical acquisition of factual information as stipulated in the syllabus and examination board.

Further, the study also found that EMs were viewed as a motivating factor particularly for the lower basic (Grades 1 to 4). Pupils usually got excited and motivated upon seeing EMs like highly coloured workbooks and wall charts. This is an indication to pupils that indeed learning and teaching were taking place.

Since Educational Materials are among the factors affecting the educability process, their unavailability affected the process of learning with the end result of low standards of education. An educational poster entitled, "Books make a Difference" (unpublished) described books as being vital tools of literacy, education and self development. The poster added that books opened windows to the world of imagination, enabled people to make choices and to think for themselves.

The poster further stated that a school was where most children learned and where they found the Educational Materials and information which helped them to develop into adults. The poster concludes that the scarcity of EMs made both the teaching and learning in the classroom very difficult.

5.2 Adequacy of Educational Materials

The Longman English Dictionary (1995:18) defines the word adequacy to mean sufficient for a specific requirement. This implies that EMs are adequate if the benefiting pupils have access to them to enable the pupils use them without having to share the available few EMs among many pupils. The Ministry of Education (MoE, 1996) policy on the textbook to pupil ratio is 1:2 for basic schools. This implies that 1 textbook should be shared by not more than 2 pupils. The ratio for supplementary materials is 1: 5. Supplementary Materials include EMs such as wall maps, readers, laboratory equipment, dictionaries, and atlases.

The study revealed that EMs were still inadequate as the textbook to pupil ratios ranged from 1:3 to 1:6 and the ratios were even higher for supplementary materials where there were very few quantities or not even available at all. The study further revealed that the major factor that contributed to this scenario was the inadequate financial resources allocated towards acquisition of EMs component.

With regard to resource availability, Rosenberg (2000:1) observed that African countries were not allocating enough financial resources towards EMs. She stated that in 1983 EMs accounted for just 1.1% of the recurrent primary education budget of most African countries whilst the average for developed countries was 4%. This comparison by Rosenberg has other implications considering that the African countries have a higher proportion of children who should pursue primary education compared to developed countries whose populations have relatively lower child ratios.

The study found that in the Zambian case, out of the whole education budget for 2003, 62% was allocated to basic education as compared to 11% and 15% for high and tertiary education, respectively (MoE, 2004). In the same year, the total expenditure for basic education amounted to US\$24,409,308.76 (K104.3 billion), out of which US\$5,359,282.55 (K22.9 billion) was budgeted for EMs, representing a proportion of 22% of the basic education budget being allocated to the acquisition of EMs.

While in 2004, the amount allocated to basic education increased to 67% of the total education budget (MoE, 2004), it reduced to 48% in 2005. In 2006, this figure further reduced to 37%. These decreases inevitably meant reductions in the proportion of funds allocated to EMs.

Although the proportion of the basic education expenditure allocated to EMs is high compared to what is reported for other developing countries (Rosenberg,2000:1), it however appears that the total budget allocation itself is low. Further the decrease in the proportion of funds allocated to basic education as well as acquisition of EMs implies that the sector is not receiving adequate budgetary support to promote quality education. This is evidenced by the fact that so far, the MoE has not, for example, managed to achieve its textbook to pupil target ratio of 1:2.

Other critical issues related to adequacy of EMs include the following:

i) Lack of replenishment programmes

The study revealed that there was no effort or deliberate programme in place to replace EMs that might have outlived their usefulness due to tear and wear or lost as a result of internal pilferage. The study further showed that EMs were usually replaced after 5 years when the curriculum was expected to be revised. The World Bank (2002) noted that acquisition of EMs was recurrent expenditure and capital expenditure because of the short life span of EMs. It is for this reason that the World Bank recommends that

as soon as the procured EMs were delivered to schools, the relevant authorities should begin procuring replenishment stocks. Schools should replace EMs as the need arose instead of focusing on a 5-year replacement cycle.

ii) Lack of appropriate storage facilities

The study revealed that the basic schools surveyed in Mongu District did not have sufficient and appropriate storage infrastructure. Kelly (1994:22) stated that adequate and secure buildings were among other factors which uphold the quality of education. Whereas Educational Materials could be available in schools, lack of infrastructure and equipment to keep them would consequently affect their state and availability. Well ventilated and shelved storerooms were a necessity to safeguard the school's EMs.

The schools surveyed during the study lacked lockable cupboards and storerooms and in most cases the headteacher's office was turned into a storeroom. Further, carton boxes were used to store the class sets of EMs especially textbooks and readers. Over time the carton boxes got torn and in such cases textbooks were piled on the floor, a situation which reduced their life span.

iii) Strengthening of Local EMs Management Policies

The study revealed that there was not enough reinforcement and establishment of local policies on the management of EMs. Whereas

individual class teachers encouraged pupils to look after the EMs, concerted effort in form of set out guidelines were not established. Local policies like a ***Book Mending Day*** for parents, teachers and pupils, exhibition of locally made EMs by the community could be organized. This way, schools would still make learning interesting for the pupils. Further, stock taking of EMs should be undertaken regularly unlike doing it at the end of the term as is the situation at the basic schools surveyed. This would be in line with the MoE (1997) Standards and Evaluation Guidelines aimed at monitoring the use and care for EMs.

5.3 Teachers and pupils' access to available Educational Materials

The study revealed that both teachers and pupils had access to the EMs that were available in the schools. Teachers collected EMs from where these were kept to the classroom. The senior teacher, in most cases was responsible for issuing out EMs to teachers who in turn gave them out for pupils' use in the classes.

However since the EMs were in short supply, pupils and teachers who wished to purchase some for their individual use were unable to do so as they could not afford their cost.

Further, the study revealed that pupils mainly accessed EMs during class periods only. Outside class, teachers were not comfortable to give pupils EMs to take home for two reasons. Firstly the EMs were not enough to give

chance to every child to take home. Secondly, once EMs were taken out of school, there was a high risk of losing some of them. In the same vein, handling by pupils over rough and long distances posed tear and wear on the EMs and thus teachers restricted the lending and borrowing aspect.

This situation could have been mitigated if all the basic schools surveyed had libraries where pupils could have access to books outside the class periods. Only 3 Out of the 14 Schools surveyed had a semblance of a library. INASP (2002:3) points out that if books are social (entertain and communicate social aspects of society to people) and capital (heavy investment is made on them) of society, libraries are the banks where this capital is deposited. Similarly, the Ministry's policy on libraries is stated as follows: "*The Ministry will promote the concept of the library as an essential learning resource in all of its schools and colleges*" (MoE 1996:88). This view therefore points to the fact that libraries promote open learning and literacy. EMs which are in few quantities could be put in the library so that pupils could still be given.

5.4 The Ministry Procurement System

Rushton et al (1991) defines procurement as the whole process of interrelated activities in the acquisition of goods and services from the producers up to the consumers. It involves a series of processes of the supply chain beginning with need identification, followed by obtaining such goods and services from possible suppliers.

The Ministry of Education procures EMs through two systems, the Central Procurement System (CPS) and the Decentralised Procurement System (DPS). Under the Central Procurement System (CPS), the Ministry headquarters purchases EMs centrally and distributes them to schools. The Decentralised Procurement System (DPS) is where EMs are purchased directly by schools. Under this system, decisions are made by the teachers who are the direct users of EMs and in this case teachers play a very important role in determining what EMs are required.

Until 2004, the Ministry has been using more of the CPS. However, as part of the Public Service Reform Programme (PSRP), the Ministry of Education devolved some of its functions and powers to the lower levels of the system. The study revealed that the Decentralised Procurement System (DPS) was the most preferred for the following reasons:

- i) The EMs got to schools on time. The levels of decision making were shorter. (They were between a school, the DEBS and the EMs supplier);
- ii) The right EMs were purchased. Teachers ordered EMs that were lacking in their schools, this way funds were utilized appropriately;
- iii) The sense of ownership was enhanced. Teachers were proud of the EMs that they ordered after making consultation with all other class teachers. This way, they looked after the Educational Materials which were part of their school resources;

- iv) Maximum use of EMs was achieved. Since teachers were the ones choosing what EMs to buy after checking what was required, the EMs so bought were therefore used.

Notwithstanding the aforementioned, the study revealed that there were EMs that were difficult to get to schools. For instance laboratory equipment and *Special Education Materials such as **Braille** for the blind were not available* with the local booksellers; meanwhile schools had difficulties in accessing them. Besides, remote schools remained marginalized as booksellers found it uneconomical to reach such schools for very limited orders. .

The study revealed that EMs for pupils with special needs (deaf and blind) and technical materials could still be bought under CPS as most of these were not available on the open shelf.

The study further revealed that teachers were not knowledgeable with the liberalization of the Book Industry. Issues of having more than one textbook in a subject for instance, were not clear to them. This posed difficulty when it came to the selection of EMs.

5.5 The Distribution of EMs

Rushton et al (1991:3) defines distribution as the movement of goods from where they originate to their destination in the right form at the right time and cost. For the purpose of this study, distribution refers to the movement

of EMs from the place of origin and the distribution centres to the schools.

The study revealed that the distribution of EMs to schools was problematic due to the rural location of most schools and also due to lack of a well coordinated distribution network system. The study revealed that some Booksellers were delivering EMs only up to the DEBS' office since some schools were far away from the district centre and also realizing that the purchased EMs were in most cases in small quantities. Booksellers found it uneconomical to reach every school because of low profit margins.

These findings are similar to what was experienced in Tanzania. Official figures in 1994 indicated that more than 16 million textbooks had been delivered to district storerooms over the previous five years. If all the textbooks had reached the schools, a textbook to pupil ratio of 1:3 or 1:4 would have been achieved. However, a survey conducted that year found that the true ratio was 1:9 with extreme variations between schools and districts. Many books did not reach schools and some that did were kept in the school storerooms. Further, some of the books produced by the state were bought by the parents in the market (<http://www2.unesco.org>). This is similar to what was also experienced in Sierra Leone. The International Development Association (IDA) Project suffered from incidents of theft at the central warehouse in Freetown. This disrupted the distribution exercise for nearly a term (UNESCO 1992:133). The EMs were delivered to the District Education Officers and consignments for schools were to be collected by

headteachers. This resulted into difficulties for remote schools away from the district office and in most cases not reachable by road.

The study further revealed that well established bookshops were not available outside the main centre of Mongu. What existed were just very small scale shops locally known as "***Tuntemba.***" Under this scenario, schools in the district could only buy their EMs from the main district centre (Mongu). In Latin America, a similar situation prevailed in that no publishing house had a distribution network capable of distributing the Educational Materials to every corner of the country. It is further reported that in many cases, EMs bought by the government remained in government warehouses (<http://www2.unesco.org>).

The respondents further revealed that lack of all weather roads was impeding the establishment of bookshops in the rural parts of the district. In addition, the limited quantities of EMs purchases through the quarterly financial allocations did not entice booksellers to supply sufficient EMs in the study area. The study revealed that most of the EMs suppliers were diversifying into other business areas along side EMs selling.

UNESCO (1996:64) states that the distribution of EMs is among other problems facing the education delivery system and notes that distribution of educational requisites should be kept to a minimum in the rainy season. Similarly, most parts of Mongu District are inaccessible in the rainy season

and thus distribution is only possible in the dry season. A well coordinated and less expensive methods need to be explored for the remote rural schools of the district. Banda (1977:16) noted that one of the problems Zambia and other developing countries were facing was the lack of sufficient Educational Materials. He added that if they were available, they have at times turned out to be irrelevant and if they were relevant they had not (at times) reached the schools in good time due to transport problems.

The study findings are further in agreement with UNESCO International Institute for Educational Planning Report (1990:55) which stated that distribution was one of the most problematic and yet under planned and under-financed areas anywhere. Further, the report observed that many developing countries had extreme distribution difficulties caused by underdeveloped transportation networks and severe physical conditions. More so basic locational analysis for warehousing is often neglected, warehousing staff are untrained and inadequate storage in the classroom resulted in expensive Educational Materials being misused and damaged.

5.6 The Educational Materials Policy

Subulwa (2004:1) defines a policy as a statement about practice. A policy is usually based on the way things are, and it gives direction of how things should be. A policy in education is normally a response to a problem or set of problems in the education sector. The Ministry adopted a National

Education Policy (NEP), "Educating Our Future" which was published in 1996. Among many other policies, the NEP addressed the issue of EMs.

The Ministry acknowledged the fact that all school children had the right to quality education (MoE 1996:84). This was possible when there was literacy skills and access to reading materials. Authors of Booklinks (April 2003) observed that textbooks alone were not sufficient even if they were available but a wide range of reading materials was necessary to enable children to learn and think for themselves and to their own capabilities.

The policy on Educational Materials stipulated that the Ministry would work together with publishers and suppliers to ensure adequate supply of textbooks and other Educational Materials for use in schools. Further, the Ministry would encourage the development of a strong and competitive local book industry. The study revealed that there was enough collaboration amongst the stakeholders. For instance, the Book Publishers Association of Zambia (BPAZ) and Booksellers Association of Zambia (BAZA) collaborated with the Curriculum Development Centre (CDC) of the MoE. For instance, the Ministry initiated a 5 day trainers' workshop for Publishers and Booksellers on ethical business. The workshop was held from 2nd to 5th November, 2004. Upcoming publishers and booksellers did not have much difficulty to start their own businesses in view of the establishment of BPAZ and BAZA. The liberalization of the economy too encouraged the growth of the Publishing Industry. However, the study revealed that local publishing

was not easy because like any other industry, capital investment was of great importance and most of the people did not have a strong financial standing. At the time of the study, the major publishing firms were of foreign origin. These flourished because they received financial support from their parent companies. The indigenous publishers did exist but most of them were not viable due to lack of finances.

The study further revealed that despite the efforts and agreements made in the past for the establishment of a Book Development Council (BDC), this was not yet achieved. One of the MoE strategies in addressing the EMs situation was to be the creation of a BDC (MoE, 1996:88).

CHAPTER SIX

CONCLUSION AND RECOMMENDATIONS

6.1 Conclusion

This study has shown that there is a general acknowledgement of the significance of EMs by pupils, teachers, headteachers, parents, Ministry of Education Officials and suppliers of Educational Materials. All these people regarded EMs as critical inputs which facilitated the learning and teaching processes.

The study further revealed that the government through the Ministry was committed to supporting quality education to all children. A review of MoE documents revealed that the Ministry was disbursing funds to the districts every quarter (after three months). For example, the Ministry disbursed US\$285,488.85 (K1, 219,882,461.92) for two quarters to the Western Province in 2005. The funds were specifically meant for the procurement of Grade 2 and 5 textbooks.

The study however revealed that despite government's effort towards the provision of EMs, their adequacy was still of great concern to many. The textbook to pupil ratio, for example among the basic schools surveyed in Mongu was higher than that of 1:2 targeted by the Ministry. The study further revealed that there was a per capita allocation of US\$5.35 (K22, 898.39) to each pupil towards the procurement of EMs in a single subject.

The amount was not adequate enough to meet the EMs to pupils' ratios because the average cost of a textbook for grade 6 for instance was US\$6.55 (K28, 000.00). This situation implied shortfalls in EMs that were to be procured.

An analysis of the budget allocation, for the years 2003, 2005 and 2006 for basic education revealed a reduction in the proportion of funds allocated to basic education and ultimately the acquisition of EMs. This finding was also collaborated by the general overview of the respondents which was that government should increase funding to schools. The inadequacies were higher in schools with low enrollments since the allocation to basic schools was determined by enrollment figures.

Apart from insufficient funding, another factor that was impeding the availability of EMs was the lack of a well coordinated distribution system. The distribution of EMs was problematic especially for remote schools. The lack of a good road network made transportation difficult. An analysis showed that the mode of transportation was by way of the headteacher or any teacher assigned to actually carry the EMs from the DEBS' Office or the Zonal Centre.

Further, lack of storerooms in most schools affected the durability and safety of EMs. The MoE document on Decentralized Book Procurement (unpublished) states that EMs should be stored away from moisture, direct

sun, dust and termites. The document further points out that the room where the EMs are kept should be secured with burglar barred door and windows with strong locks. However, the study revealed that most of the infrastructure in the schools surveyed, did not have adequate room to be used specifically for storage of EMs. In some cases, the available rooms were in a deplorable state and could not be used as storerooms.

The study findings further revealed that teachers adopted various management styles to care for EMs. This was in line with the MoE policy which stated that *EMs cost a lot of money and therefore the procured EMs must be looked after by all the schools* (MoE 2005 unpublished). However, there was still room for improvement with regard to adoption of local policies such as Book Mending Day, introduction of an Educational Materials Fee.

6.2 Recommendations

The study has revealed several weaknesses in the procurement, delivery and use of EMs in basic schools of Mongu District. These findings are probably a general reflection of the situation of most basic schools in rural areas of Zambia. As it is the aim of the Ministry of Education to meet the Millennium Development Goal (MDG) of achieving universal primary (basic) education for all by 2015, there is urgent need to address the issue of EMs if Zambia is to meet this important MDG. To address the findings of this study, the following recommendations are made:

6.2.1 Funding for Basic Education

The study has clearly shown that the amount of financial resources allocated to the basic education sub-sector for acquisition of EMs is low. The per capita allocation of US\$5.35 (K22, 898.39) per child ought to be revised upwards to enable basic schools purchase sufficient levels of EMs. These funds should also enable schools to constantly replenish EMs.

6.2.2 Storage of Educational Materials

Even when EMs are procured, their shelf life is shortened due to poor storage facilities. Every school should be compelled to put up sufficient storage facilities that lengthen the shelf life of EMs. The Directorate of Standards and Curriculum responsible for school inspections should prioritize this issue to ensure that all schools comply. Unless this is done, the bulk of the funds allocated to acquisition of EMs will not be well spent as schools will not manage to keep up with their EMs replenishment needs. It is therefore beneficial when they can strengthen the life span of each EM purchased.

6.2.3 Procurement of Educational Materials

Despite the decentralization of the procurement system, the study has shown that basic schools have difficulties in procuring certain types of EMs (e.g. laboratory equipment). It is therefore recommended that the Ministry continue to centrally procure such materials and distribute them to basic schools.

6.2.4 Policies

From the findings of the study it is clear, for example, that the textbook to pupil ratio of 1:2 has not been achieved. It would appear however that the Ministry did not monitor the implementation of its policies. It is therefore recommended that:-

- i) The Ministry should constantly monitor the implementation of its policies and/or assess the achievement of their stated goals, with a view to making improvements where feasible;
- ii) It would also be a useful thing for the Ministry of Education to implement the policy on School Library Service. This policy objective aims at schools having libraries to enable pupils have a conducive learning environment;
- iii) Further, through the DEBS, the Ministry should strengthen distribution networks for remote schools so as to ensure that EMs purchased by such schools actually reach the schools;
- iv) One weakness revealed by the study relates to the EMs replenishing policy. This policy advocates for replenishing of EMs every 5 years in line with changes to the syllabus. This policy objective is not effective since the replenishment

requirement for basic schools is less than 5 years. Schools should be at liberty to replenish EMs as the need arises instead of waiting for 5 years for them to do so;

- v) During the study, it was also clear that some school authorities were not familiar with some educational policies. There is need for the Ministry to ensure that all key educational personnel clearly understand the existing policies so as to achieve successful implementation of such policies.

6.2.5 Future Research

While the study focused on issues related to the Management of Educational Materials in basic schools in Mongu District, a number of educational areas still require investigation. These include the following that are possible future research areas:

- i) The Interrelationship between the public and private sectors in Educational Materials provision;
- ii) The Management of Educational Materials in High Schools;
- iii) Getting Educational Materials to schools in a cost-effective way;
- iv) Factors affecting Teacher Initiative in developing Educational Materials;
- v) An Investigation into a workable Educational Materials Distribution System for Remote Schools.

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8.0 APPENDICES

Appendix 1 : Basic School Headteachers' Questionnaire

BASIC SCHOOL HEAD TEACHERS' QUESTIONNAIRE SERIAL

NO _____

GUIDELINE: You are kindly requested to answer the questionnaire on Management of Educational Materials in Selected Basic Schools of Mongu District, Zambia. Your input will help improve the standards in basic schools. Indicate the most appropriate answer by ticking against the answer of your choice or fill in the spaces provided with your response.

CONFIDENTIALITY: The information you provide is highly confidential and will not be used or retrieved by any other party for any other purpose apart from the Researcher's academic use.

Part I - Background Information

Name of school _____

Urban, Peri-Urban, Rural _____

1. What is your gender/sex
☐ Male ☐ Female
2. State your professional qualification
☐ Teachers' Primary School Certificate
☐ Diploma in Teaching
☐ Advanced Diploma in Teaching
☐ Degree in Education
☐ Other (specify) _____
3. How long have you been the Head Teacher of this school?
☐ 5 years
☐ Less than 5 years
☐ 10 years
☐ Over 10 years
4. How long have you been in the position of Head Teacher?
☐ Less than 5 years
☐ 5-10 years
☐ Over 10 years

Part II - Provision and Access

5. In your opinion, who is responsible for the procurement of EMs for basic schools?
☐ Senior officer at Ministry Headquarters (and at School level)?

- () The DEBS' office
- () School Heads
- () Selection Committee at the school
- () Other (specify) _____

6. From your experience, is there a system in place followed for the procurement of EMs?

- () Yes () No

7. If your answer to question 6 is yes, does the system work

- () Yes () No

8. If your answer to question 6 is No, give reasons for saying so

9. Does your school have adequate Educational Materials for teaching and learning?

- () Yes () No

10. How many pupils use one textbook at the three basic levels?

- (i) _____ pupils use one textbook at Lower Basic
 (ii) _____ pupils use one textbook at Middle Basic
 (iii) _____ pupils use one textbook at Upper Basic

11. How can the availability of Educational Materials be improved in your school? Suggest good practices that you as the Head feel can help out to address the situation.

- (i) _____
 (ii) _____
 (iii) _____
 (iv) _____

12. In your own words, briefly explain the main elements of the Ministry's policy on the provision of Educational Materials.

- (i) _____
 (ii) _____
 (iii) _____

13. List under the headings given, examples of books that you have at your school.

Grade	Approved Books	Recommended Books
2		
4		
6		
8		
9		

14. Mention the Local Body Committee which works with your school to manage EMs.
- (i) _____
- (ii) _____
- (iii) _____

15. In what ways do the mentioned Local Body Committees work with the school?

16. What do you consider to be the life span of a textbook under normal daily use?
- () up to 3 years () up to 5 years () more than 5 years

17. From your planning process, what was the school's total expenditure on Educational Materials for in the year 2005?

18. Mention two suppliers of Educational Materials available in your district.

(i) _____

(ii) _____

Part III- Distribution

19. Educational Materials for your school are usually distributed from the
☐ DEBS' office to the school
☐ Zonal Centres to the school
☐ School store rooms to the classroom
☐ Other (specify) _____
20. Where do teachers collect the Educational Materials required for their daily use?
☐ Central Store Room
☐ Head's Office
☐ Senior Teacher' Office
☐ Library
☐ Other (specify) _____
21. From your experience, do you think the distribution of Educational Materials is one of the problems faced by schools?
☐ Yes ☐ No
22. Mention two major problems you have faced concerning the distribution of Educational Materials at different levels given below:
From the Ministry Headquarters to your school
(i) _____

(ii) _____

From the district Education Board Secretary's Office to your school
(i) _____
(ii) _____

From where the Educational Materials are kept in your school to the classroom
(i) _____
(ii) _____

23. What type of storage facilities do you have for the various Educational Materials that the school has?

24. At your school whose responsibility is it to manage the Educational Materials and issue them to teachers?
- () The Head Teacher
 - () The Deputy Head Teacher
 - () The Senior Teacher
 - () Any teacher assigned
 - () Other (specify) _____
25. Are there any teachers who have received training through workshops or seminars in the selection of Educational Materials?
- () Yes () No
26. How often has the District Education Board Secretary visited your school over the last 12 months?
- () Every three (3) months () every six (six) months () once a year
- () Other (specify) _____
27. What else would you want to say about EMs in your district?
- (i) _____
- (ii) _____
- (iii) _____

THANK YOU SO MUCH FOR YOUR CO-OPERATION

Appendix II: Basic School Teachers' Questionnaire

BASIC SCHOOL TEACHERS' QUESTIONNAIRE SERIAL NO _____

GUIDELINE: Taking into account your knowledge and experience about the provision, access and distribution of Educational Materials (EMs) to both the teacher and the pupil, kindly give your opinion by ticking against the most appropriate answer or by filling in the spaces provided with your response. The information you give will be treated confidentially. Therefore, there is no need to write your name.

CONFIDENTIALITY: The information you provide is highly confidential and will not be used or retrieved by any other party for any other purpose apart from the Researcher's use.

Part I - Background Information

Name of school _____

Urban, Peri-Urban, Rural _____

1. What is your gender/sex
() Male () Female
2. State your professional qualification
() Degree in Education
() Advanced Diploma in Teaching
() Diploma in Teaching
() Teachers' Primary School Certificate
() Other (specify) _____
3. How long have you been a teacher at the school?
() Less than 5 years
() 5 years
() 5 -10 years
() Over 10 years
4. What grade levels do you teach?
() Lower Basic
() Middle Basic
() Upper Basic

Part II Provision of Educational Materials

5. From your experience, does the school provide adequate EMs?
() Yes () No

6. If your answer to Question 5 is yes, list the kind of Educational Materials that your school has for the grades you teach.

(i) Lower Basic:

(ii) Middle Basic:

(iii) Upper Basic:

7. How are the Educational Materials for your school provided?

☐ The School buys them

☐ The District Education Board Secretary's office (DEBS) buys on behalf of the school

☐ The Ministry of Education Headquarters provides the Educational Materials

☐ Other (specify) _____

8. Do you think the present arrangement of providing the Educational Materials to the school is effective?

☐ Yes

☐ No

9. Give reasons for your answer to question 8.

10. From your experience, are the Educational Materials that the school has of the right type that you would have preferred?

☐ Yes

☐ No

11. Do you think that the quantities of Educational Materials are adequate for each class category:

(i) Lower Basic: ☐ Yes

☐ No

(ii) Middle Basic: ☐ Yes

☐ No

(iii) Upper Basic: ☐ Yes

☐ No

12. List under each heading the Educational Materials that apply.

S/N	EMs that the school is well stocked with	EMs not in adequate quantities	EMs not available in the school
1.			
2.			
3.			
4.			
5.			

13. Does your school have any solution to the problems of the EMs that are not available for your use?
 () Yes () No

14. If your answer to question 13 is yes, mention the solution

15. In your personal view, what would be the best solution to address the problem of non-availability of EMs?

Part III – Access

16. Indicate in the table below the number of pupils that share the mentioned item in the class/grade you teach.

S/N	Educational Material	Number of pupils per item		
		Grade.....	Grade.....	Grade.....
1.	English Textbook			
2.	Mathematics Textbook			
3.	Social Studies Textbook			
4.	Science Textbook			

17. In what situations do you give pupils school EMs for their individual work?

18. How long are the pupils allowed to keep the school EMs in the situations you have mentioned in question 17?
-
-
19. From your experience and opinion, are the pupils satisfied with the amount of time given to them to use the Educational Materials?
☐ Yes ☐ No
20. In your opinion, do the pupils benefit from using the Educational Materials given to them?
☐ Yes ☐ No
21. Do you have access to the EMs you require for your daily use in the classroom?
☐ Yes ☐ No
22. If yes to Question 21, where do you get your teaching materials from?
☐ Head's office
☐ Senior Teacher's office
☐ School Library
☐ School Store Room
☐ Other (specify) _____

Part 1V- Distribution and Storage

23. Do you think the Educational Materials intended for use by teachers get to your school on time?
☐ Yes ☐ No
24. If your answer to Question 23 is No, what could be some of the reasons for the delay?
- (i) _____
- (ii) _____
25. As you may already know, Educational Materials are expensive and their security is of concern to teachers. What do you do about protecting your materials when:-
- (i) in storage? _____
-

(ii) being transported from where they are kept to class?

(iii) when in the pupil's custody?

26. Do you think the distribution of Educational Materials is one of the problems affecting the school?
() Yes () No
27. Imagine your school's order of various Educational Materials has just been delivered at the school. Whose responsibility is it to check the received stock?
() The Head Teacher
() The Deputy Head Teacher
() The Senior Teacher
() Any Teacher assigned
() The Stores Officer
() Other (Specify) _____
28. What measure do you take when a pupil loses a book?
() He/She is subjected to physical punishment
() He/She is charged to pay for the book
() He/She is warned not to repeat the same action
() Other (Specify) _____
29. Does the school organize awareness meetings for pupils, teachers and parents aimed at informing them about the Educational Materials the school may have received?
() Yes () No
30. What else would you like to say about your school and Educational Materials?
(i) _____
(ii) _____

THANK YOU SO MUCH FOR YOUR CO-OPERATION

Appendix III: MoE Officials Questionnaire

MINISTRY OFFICIALS' QUESTIONNAIRE SERIAL NO. _____

A STUDY ON MANAGEMENT OF EDUCATIONAL MATERIALS IN SELECTED BASIC SCHOOLS OF MONGU DISTRICT, ZAMBIA.

GUIDELINE: In consideration of your experience and knowledge about the management of Educational Materials (EMs) to Basic Schools, kindly give your opinion on the provision and distribution of EMs to basic schools.

CONFIDENTIALITY: The information you provide is highly confidential and Will not be used or retrieved by any other party for any other purpose apart from the author's use.

Part I - Background Information

1. What is your gender/sex
☐ Male ☐ Female
2. What is your professional qualification?
☐ Degree in Education
☐ Advanced Diploma in Education
☐ Diploma in Education
☐ Other (specify) _____
3. What is your position at the Ministry District Education Board Secretary's office?

4. How long have you been in your present position?
☐ Less than 5 years
☐ 5 years
☐ 5-10 years
☐ Over 10 years

Part II- Provision of Educational Materials

5. From your experience, do you think the Basic Schools in Mongu District have adequate Educational Materials?
☐ Yes ☐ No
6. Why do you say so?
(i) _____

(ii)

(iii)

7. In your view, state the main elements of the policy on Educational Materials state?

(i)

(ii)

(iii)

8. In your view, whose responsibility is it to see to it that the policy is implemented at district level?

9. In Mongu District how are funds for the purchase of Educational Materials sent to Basic Schools?

- ☐ They are sent to schools directly
☐ They are held at the district office
☐ Disbursed from the Ministry headquarters to schools
☐ Other (specify) _____

10. Going by the district budget Process, how are the funds for the purchase of EMs determined?

- ☐ based on enrolment figures i.e. amount per child
☐ based on the geographical location of the school
☐ determined by school administration
☐ Other (specify) _____

11. Going by your district planning process, what is the difference between our estimated budget for the EMs for the district and what is actually released? Show this by giving a comparative analysis for the last two years.

Year	Estimated budget	Actual Release
2004		
2005		

12. Have you ever collaborated or worked in partnership with some organizations in your district to provide additional funding for the EMs?

() Yes () No

13. If yes to Question 12, fill the table below:

S/N	Name of organisation	Type of organisation	Type of collaboration
1			
2			
3			
4			
5			
6			

14. If No to Question 12, in your view name such organizations that can work with your office to give financial support towards the provision of EMs.

(i) _____
(ii) _____
(iii) _____
(iv) _____

15. From your experience, are there EMs that are very difficult to provide schools with despite their usefulness?

() Yes () No

16. If Yes to Question 15, please mention them.

17. List the suppliers of EMs that you deal with in your district.

(i) _____
(ii) _____
(iii) _____

18. Are you satisfied with the suppliers that you have?

() Yes () No

19. Give reasons for your answer to Question 18

20. Would you prefer that all the EMs should be bought using the decentralized system?
() Yes () No
21. In your view, which system would you prefer, centralized or decentralized procurement of EMs ?
() Centralized System () Decentralized System
22. Give reasons for your answer in Question 21
(i)
(ii)
(iii)
23. In situations where different EMs are distributed from the District Office to Basic Schools. What type of transport is used?
() Hired transport from the district to individual schools
() District Office vehicles deliver the EMs to Schools
() Schools come to collect the EMs from the district using own resources
() Other (specify) _____
24. Does the district keep records of what is issued out to schools?
() Yes () No
25. What type of storage facilities is available at your district?

26. In your view, is this storage facility adequate?
() Yes () No
27. If No to question 26, what improvements would you recommend?
(i)
(ii)
(iii)
28. Do you have a trained Stores Officer?
() Yes () No
29. What is his/her highest level of training?

30. If you do not have a trained Stores Officer, mention the officer responsible for the stores function.

31. Do you think the distribution of EMs is one of the problems affecting availability of EMs in Basic Schools?

() Yes () No

32. If Yes to Question 31, mention the major problems associated with the distribution of EMs to Basic Schools.

(i) _____

(ii) _____

(iii) _____

33. Similarly, suggest ways of limiting the distribution problems.

(i) _____

(ii) _____

34. What else would you want to say about Educational Materials in your district?

(i)

(ii)

THANK YOU SO MUCH FOR ANSWERING THIS QUESTIONNAIRE.

Appendix IV: Unstructured Interview Schedule with Pupils

BASIC SCHOOL UNSTRUCTURED INTERVIEW SCHEDULE FOR PUPILS

Background Information

Name of School _____
Urban, Peri -Urban, Rural _____
Male/Female _____
What grade are you doing? _____
How long have you been in this school? _____

1. Do your teachers give you textbooks say in English Language?
2. If so, do you have other materials in other subjects?
3. What are these materials?
4. Does the teacher give each pupil a textbook or do you share?
5. If you share, how many pupils share a book?
6. Are you satisfied with the number of books that you are given?
7. Apart from books what other materials does the teacher use in teaching?
8. Are there other materials you would like to have but are lacking in your school?
9. How long does the teacher allow you to use a textbook?
10. Are you happy with the amount of time you are given to use the textbooks?
11. What happens when a pupil loses a book?
12. As a class, how do you care for your classroom materials?
13. What other ways would you suggest for caring of your class Educational Materials?

Appendix V: Unstructured Interview Schedule for Parents

BASIC SCHOOL UNSTRUCTURED INTERVIEW SCHEDULE FOR PARENTS

Background Information

Name of School _____

Urban, Peri -Urban, Rural _____

Male/Female _____

Academic Qualification _____

Number of children/dependants _____

Views on provision and access

1. Do you consider that school textbooks, chalk, chalkboard are essential to the education of children? Why do you think so?
2. From your interaction with your children, do you think the school provides them with the essential school Educational Materials?
3. What is the current situation of Educational Materials?
4. What kind of interaction does the school have between the teachers and parents?
5. Are children given pieces of homework for which they are supposed to use textbooks or other forms of materials from school?

Views on Management

6. Were parents part of decision making in the purchase of EMs for 2005?
7. In your opinion, what suggestions would you give to help the school acquire the EMs necessary for teaching.

Appendix VI: Unstructured Interview Schedule with EMs Suppliers

BASIC SCHOOL UNSTRUCTURED INTERVIEW SCHEDULE FOR EDUCATIONAL MATERIALS SUPPLIERS

Background Information

Name of Firm _____

Urban, Peri -Urban, Rural _____

Male/Female _____

Academic Qualification _____

1. Do you consider that school textbooks, chalk, and chalkboard as essential to the education of children? Why do you say so?
2. From your business dealings with the Ministry, do you think Educational Materials are considered one of the major requisites in the education delivery system?
3. Going by the business you have with the Ministry, What would you say about the current availability of Educational Materials in schools?
4. Are you satisfied with the Ministry's procurement system of EMs? In your opinion, what suggestions would you give to help the school acquire the necessary EMs?
6. What else would you like to say about EMs?

Appendix VII: Details of schools surveyed

Table 20: Names of basic schools and location

S/N	Name of school	Distance from Mongu District	Geographical Location from Mongu District
1	Kaande	10	North East
2	Kanyonyo	5	Within Mongu
3	Katongo	7	Within Mongu
4	Lwandui	75	East
5	Mabumbu	16	North
6	Mawawa	27	North East
7	Moombo	28	North West
8	Mukoko	5	Within Mongu District
9	Mupatu	23	North West
10	Mutuwambwa	10	South of Mongu District along Mongu-Senanga road
11	Nakaanya	97	East
12	Nañoko	30	North West
13	Namitome	25	North
14	Namushakende	25	South of Mongu District along Mongu-Senanga road