REMOVING BARRIERS TO ACCESSING QUALITY BASIC EDUCATION

DRAFT

Summary Report of an Online Discussion held January 16-February 2, 2007

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Education for All – Fast Track Initiative
Accelerating progress towards quality universal primary education
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EXECUTIVE SUMMARY

From 16 January to 2 February 2007, the Global Learning Portal (GLP) hosted a series of discussions about removing barriers to accessing quality basic education. More than 160 participants from around the world contributed to conversations about the barriers to basic education, learning and quality, monetary costs of schooling, and the School Fee Abolition Initiative (SFAI).

The online discussion was a collaborative effort under the umbrella of the Fast Track Initiative (FTI), organized by USAID in partnership with the World Bank and UNICEF. The discussion was designed to elicit workable, cost-effective approaches to reaching and sustaining EFA goals, while also identifying areas in which additional research and analysis are needed.

Most education policymakers and advocates agree that children must be ensured access to quality learning opportunities. However, there is less agreement on the barriers to access and persistence, the relative importance of different barriers to education, and the most effective means to minimize or remove these barriers. This online discussion was designed to gather available evidence on barriers to quality basic education, and to provide a forum for open discussion on barriers with various stakeholders around the world.

Invitations were sent to over 300 e-mail addresses, including listservs. To take part in the conversation, participants joined GLP, clicked on a link to the community, and visited the current discussion thread. Each session included background material, was facilitated by an expert moderator, and resulted in a Session Summary (See session outline below and Annex 1 and 2). Participants were also invited to complete a short survey and a membership profile to provide additional information on their country and organizational affiliations (See Annex 3 and 4).

Session 1: Barriers to Accessing Basic Education (Jan. 16-17): Kristi Fair (USAID)
Session 2: Learning and Quality (Jan. 18-19): Kenneth Eklindh (UNESCO)
Session 3: Quantifying the Monetary Costs of Schooling to Households (Jan. 22-23): Mark Bray, assisted by Serge Peano (IIEP)
Session 4: A Data-based Assessment of Efforts to Remove Barriers (Jan. 24-25): Desmond Bermingham (FTI)
Session 5: SFAI: An Effort to Accelerate Movement Toward EFA by Reducing the Costs of Schooling (Jan. 26, 29-31; Feb. 1): Dina Craissati (UNICEF)
Session 6: Summary and the Way Forward (Feb. 2): Robert Prouty (FTI)

Over 160 participants joined the discussion from more than 35 countries around the world. The majority of the participants were from the United States, predominantly representing multilateral and bilateral donor agencies, and non-governmental organizations. The other countries, while not represented in as large a number, did reflect a wide range of countries and affiliations. Ministry officials participated from Zambia,

Due to the nature of online discussions, this forum was limited to individuals who have reliable internet access, and who are comfortable using an internet-based platform for discussion. Further, to facilitate a global dialogue, the discussion was held in English. Some participants joined the discussion and read postings but did not post their own comments into the discussion threads. Therefore, while the discussion was accessible to a wider audience, the following analysis is based on comments from a smaller group who actively posted comments. 1 A content analysis methodology was used to provide descriptive information about the discussion. The participant sample for this discussion was not chosen at random and was not large enough to conduct any inferential statistical analysis; therefore, we cannot generalize the comments posted in this discussion to the broader population. A complete description of the methodology used is provided in Annex 5.

Out of the fifteen themes identified in the discussion (See Annex 6), the top three most frequently discussed themes were: the quality of education (43% of the participants), public/donor financing for education (32% of the participants), and monetary barriers to schooling (30% of the participants) (See Annex 7). Participants recognized monetary costs, including direct and indirect costs, as a major barrier to accessing basic education. However, more participants discussed the quality of education as a barrier, or it becoming a barrier if school fees abolition or another similar policy is implemented in an effort to reduce the financial burden on families. Participants also raised concerns about how education systems will be financed without monetary contributions from households.

Even though these three themes were discussed most frequently overall, an analysis of the discussion based on professional affiliation of the participants indicated varying levels of interest in the themes discussed. Annex 8 shows how frequently participants from a certain professional affiliation discussed a particular theme. 2 The tables show that multilateral/bilateral donor agencies most frequently discussed educational planning, where as other groups (non governmental organization, ministry officials and researchers and academics) discussed quality of education most frequently. Along with quality, ministry officials most frequently discussed the lack of qualified teachers in the system, where as both non-governmental organizations and donor agencies identified the need for more data and research. All the stakeholders brought different perspectives to the discussion and emphasized distinct issues. The range of perspectives indicates that the

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1 This discussion was envisioned as the first in a series of planned discussions. Future discussions could be designed as more focused discussions, for example, with teachers or parents.
2 These tables only account for the participants that posted comments under the discussion topics, and therefore, do not reflect the views of all participants that joined the discussion.
issue of removing barriers to accessing quality basic education does not have a simplistic solution that everyone agrees on. Rather, this is a complex issue, further complicated by unique country and within country contexts, that needs to be understood from different perspectives.

Participants debated the various issues, but there appeared to be consensus on the following main findings:

- When discussing barriers to children accessing and persisting in school, participants identified monetary factors most often, however, several other factors emerged as significant barriers including: lack of qualified teachers, relevance/rate of return to basic education, opportunity costs, cultural practices, and distance.
- A fee removal policy introduces many challenges that must be addressed if the enrollment gains associated with fee abolition are to be sustained.
- The quality of education, both before and after the expansion of access to schooling, is problematic and at present, not measured adequately.
- Planning is needed to target programs to remove barriers for the most underserved groups, and to avoid unintended consequences.
- A research agenda is needed to respond to unanswered questions and to address gaps in information. Emerging questions include:
  - What factors have the greatest influence, and what is the relative priority/importance of these factors with regard to parents’ decisions to send or not send their children to school?
  - Is the quantity/quality trade-off inevitable?
  - How much donor financing is needed, and are donors willing to invest in the long-term financing of school fee abolition?
  - What are the management and governance interventions that need to accompany school fee abolition, and what are the roles of the different stakeholders?
  - What policy options are available to eliminate monetary and other barriers for the most underserved children while maintaining quality learning outcomes?
SESSION SUMMARY REPORT
(See Annexes 1 and 8)

This section provides a brief summary of each of the six sessions.

In **Session 1**, participants identified a number of barriers to accessing basic education and discussed the relative importance of the barriers. These barriers included but were not limited to the following: financial barriers, in the form of school fees and opportunity costs; cultural factors, particularly for girls; weak institutional capacity; weak human capital; i.e. lack of qualified teachers; weak school infrastructure (i.e. overcrowded schools); and accessibility/distance to school.

Some participants suggested approaches to removing barriers, while other participants challenged the underlying assumption that getting more children in school should be an exclusive goal. Further, while there are some universal barriers that challenge access for many children in the world (i.e. transportation and insecurity) other barriers are more idiosyncratic, and approaches that address them must be context- and community-specific.

In **Session 2**, participants discussed the relationship between school quality and access. Participants debated some of the reasons for the poor quality of education. The key factors affecting quality included: teachers, early childhood interventions, community involvement, and the access/quality tradeoff. The relationship between teachers and quality education was an important thread. On the topic of measuring learning, contributions included discussion on the clarification of definitions of learning outcomes, and the importance of giving feedback from assessments back to teachers and parents so that they can help students learn.

The quality of education was a main topic throughout the discussion. Specifically, participants debated the definition of quality education. In defining quality, some participants focused on infrastructure and inputs, while others emphasized learning outcomes.

In **Session 3**, participants identified a range of financial and economic barriers to both access and the completion of schooling. Costs included: registration fees, uniform fees, books, transportation, related costs, such as the need for birth certificates in order to take the primary leaving exam, and opportunity costs and foregone earnings.

Some postings specified the exact school fee structure in a given country, while others identified less visible financial barriers to both primary and secondary education. It was generally recognized that the non-fee and indirect costs of schooling constitute a heavy burden on poor families. It was also noted that fees at the secondary level are high and have a different structure than those at primary level. More than one participant discussed the combination of removing formal fees and developing pro-poor policies like scholarship schemes. Views differed regarding families’ willingness to pay for education and which fees pose the greatest burden to families.
In Session 4, participants identified a number of programs that have been shown to be successful in overcoming barriers to education. The limitations of these interventions were also discussed; for example, the provision of low quality of education and challenges with implementation and sustainability.

While evidence of success was provided for scholarship programs, conditional cash transfer programs (CCTs), and interactive radio instruction (IRI), other participants cautioned that success was not universal. Not all programs effectively target beneficiaries, for instance. Further, some programs that provide incentives (such as food, books, or oil) are not successful in the long-term because of lack of coordination, inadequate monitoring and evaluation, or short-sighted planning. While enrollments may increase initially, the increases are not sustained.

Some programs that were described as successful approaches to removing barriers to education included: girls’ scholarships in Kenya, IRI (e.g., the RADECO program in the Dominican Republic), programs that address both indirect and direct costs for children engaged in child labor, conditional cash transfers in Latin America, and programs that provide non-monetary incentives such as oil or food in Pakistan. In addition, the Comprehensive Schools Project in Egypt was cited as demonstrating the benefits of community participation and altering perceptions about education. One caveat to all of these programs is the absence of agreement about what qualifies as “success.” In some cases, small gains may have been made at a large financial cost, gains may not have been sustainable in the long-term, or factors such as education quality and learning were not considered.

In Session 5A, the discussion centered on the concern that abruptly removing school fees may cause a decline in the quality of education because it could result in additional stress on already weak infrastructure and administration systems. The main question asked was, what must be done to preserve quality while abolishing school fees?

Some participants agreed that removing school fees is an important step toward increasing access and equity, but that it alone is not sufficient, especially for student retention. Other inputs may be needed, such as school feeding programs, scholarships to offset other opportunity costs, more teaching materials, increased teacher training, strengthening community participation, and greater government spending per pupil. There was consensus that if undertaken, school fee abolition needs to be planned within system wide-reforms. Another area of consensus was that needs differ depending on the context. For example, many of the reasons for students dropping out are different in rural settings than in urban settings.

In Session 5B, participants were encouraged to consider challenges to ensuring equity while implementing school fee abolition policies. While school fee abolition is in itself a pro-poor measure, in many countries, excluded, marginalized, and vulnerable groups (girls, children affected by HIV/AIDS, poor, and rural children) still encounter barriers to
schooling despite fee abolition and may need additional targeted financial and non-financial support.

One participant from Kenya highlighted the importance of bursaries and scholarship programs that address gender disparities and children affected by HIV/AIDS. However, another participant’s presentation of problems with a Bangladesh female stipend program indicates that there is no agreement on how these initiatives should be implemented to ensure that they reach the target population and have an impact on equity. Further, these programs are expensive and may not be sustainable in the long-term if participants become dependent on them. Participants agreed that programs that include targeting need effective monitoring and evaluation.

In Session 5C, participants discussed the management and governance challenges of school fee abolition processes. School fee abolition and the ensuing surge in enrollment involve massive efforts to manage resources and supplies, and to disburse these resources to the school. This requires education systems to ensure proper flow of resources, school capacity building, and effective participatory mechanisms.

There was consensus on the general vulnerability of education systems in weak states when eliminating school fees (especially with regard to ensuring transparency, sustainability, and outcomes). One participant underscored the need for proper planning and management of school fee abolition. This comment was based on the example of Papua New Guinea, where school fees were abolished and later reinstated after a new government responded to the influx of additional students.

Many participants indicated that the real challenge of school fee abolition is to determine how countries can better mobilize and manage domestic financial resources, particularly through an improved taxation system. Some participants argued that it takes time to generate revenue and develop sound fiscal management in weak states; therefore, in the short term, children’s immediate needs must be addressed using interim funding mechanisms and relying on external support.

In Session 5D, participants examined financing options for school fee abolition in the short- and long-term. Participants raised concerns about governance and noted the importance of a strategy of transferring funds directly to schools.

Many agreed that before fees are removed, there has to be a way to accommodate the expected increase in enrollment, and to replace fee revenues. Specifically, school fee abolition requires improved mobilization and management of domestic financial resources, especially through improved taxation systems. Participants highlighted the fact that the challenge of effectively managing the budgetary allocation to the education (and social services) sector is an issue many countries face.

Participants also underscored the need to improve government and Ministry of Education resource management systems (to reduce waste and corruption) as part of the strategy of abolishing school fees. One participant viewed removing fees as an opportunity to
develop effective mechanisms for transferring funds directly to schools, and empowering local school personnel to manage these funds and make decisions about enhancing school quality and learning.

In **Session 5E**, participants examined country experiences and lessons learned from the ways in which school fee abolition processes have been designed and planned within strategic and sustainable education policy frameworks. Some participants suggested that continued technical and financial support from the donor and international community will be needed to sustain school fee abolition policies because of the burden the policy places on governments to cover all of the expenses of running the education system. This discussion raised concern about the trend of increased dependence on external funds by some of the poorest countries without the guarantee of continued support.

The public/private provision of education was also raised as a topic for discussion. Kenya was cited as an example, whereby fee abolition resulted in transfers from private non-formal schools to overcrowded government schools, which in turn triggered a movement back to private schools (perhaps at least partly because of the perceived deterioration in the quality of public schools). In response, one participant cautioned that the data on such transfers and on enrollment in private, non-formal, and non-registered schools is incomplete.

**Session 6** included Session Summary Reports from the previous sessions. This final session provided an opportunity to summarize the discussion and to identify next steps. Some participants argued for a human rights based approach articulating that every child has a right to attend school free of charge. Other participants were less supportive of removing fees for all children, arguing that in countries with severely constrained resources, those who can pay should continue to pay. Some suggested collecting funds from those willing and able to pay, and providing targeted scholarships for those who are unable to pay. Still others pointed out that education never can be free because someone always has to cover the monetary and opportunity costs.

There was agreement, however, that removing fees without a plan has the potential to do more damage than good. Specifically, removing fees will not have the intended positive effects without adequate attention to quality and learning outcomes. Participants also agreed that the solutions are country and context specific.

Participants agreed that there is need for more research, particularly on learning outcomes. There was also a suggestion to move the discussion forward by including developing country teachers as a key group to discuss how to achieve effective learning given resource constraints.
RESEARCH FRAMEWORK

The following key topics were identified as areas for further research. The topics and questions are based on the Session Summary Reports.

**Barriers to Education: Access**
While there is an abundance of anecdotal evidence on barriers to education, there is limited analysis on the relative importance of specific barriers, particularly with regard to unique populations, and the complex interrelationships between barriers. A relevant question might be what factors have the biggest influence on parents’ decisions to send or not send their children to school? The response to this question will differ depending on the country and within-country context. While this question is often asked in household surveys, the responses to these questions have not been systematically analyzed for trends and discrepancies. A follow-up question would be: what is the relative priority/importance of the identified barriers in terms of how they affect the family decision to send children to school? There may be a distinction; however, between the barriers that impact access compared to the barriers that impact persistence in school. This could be further explored. It is also important to differentiate between demand side barriers and supply side barriers. For example, cultural issues associated with sending girls to school are a demand side barrier, and location of the school is a supply side barrier.

**Learning/Quality**
Preliminary evidence seems to show that rapidly increasing enrollment comes at the cost of educational quality. An important area for further research is to investigate the ways in which school fee abolition affects learning. Is the quantity-quality trade-off inevitable? What are the intervening variables in the effect between school fee abolition and reduced quality (i.e. PTR, increased use of unqualified teachers, net reduction of resources for schools?) How can learning be improved within the current constraints (i.e. if you can’t increase resources to pay teachers more or provide better conditions of services, etc.)?

**Financing Fee Abolition/Management and Accountability**
More research needs to be done in terms of how to finance a policy decision to remove fees. How much donor financing is needed? Are donors willing to invest in the long-term financing of school fee abolition? How can the education system be supported to effectively respond to a policy decision to remove fees? For example, how can teachers be trained, deployed, and paid to keep up with the rise in number of students?

How do countries with weak fiscal management structures cope with school fee abolition processes? What mechanisms for resource management have worked? What roles have civil society, parents, and communities played in resource management? What are the management and governance interventions that need to accompany school fee abolition?

Can the classification of expenditures and financial barriers into direct school support costs (fees) and indirect costs of attending (transport, food, books) provide a basis for
policies and support that differentiate issues of ability and willingness to pay? What is the nature and effectiveness of alternative revenue sources that support local schools?

Data
Reliable data for planning policy around removing barriers to schooling is missing. Data like number and location of out-of-school children is not always available. School mapping systems are available, but are not always used effectively for policy planning. It will be important to consider the methodology for data collection, interpretation of data collection, and utilization of data for policy planning and implementation.

Policy Options and Implications
Experience has shown that enrollment increases immediately after the policy change, but that this is not sustained in the long run as many students do not complete primary school. It would be helpful to better understand the direct impact of a fee abolition policy on family and community decision making in the short-term and long-term.

What policy options are available to eliminate financial barriers for the neediest children without distorting other aspects of the education system? What are the relative advantages of targeting financial and other support to the neediest children and households, as opposed to simply eliminating school fees for all children?
ANNEX 1: SESSION SUMMARIES

This annex includes Session Summaries from each session. These reports were prepared by the moderators with assistance from the shadow moderators. The summaries were prepared with the following general outline: topic context, key issues, existing successful approaches/evidence, topics for future research, and remaining questions.

Session 1: Barriers to Accessing Basic Education
Dates: Jan. 16-17, 2007
Moderated by: Kristi Fair, USAID
Shadow Moderated by: Carrie Willimann, AED
Approx. # of Participants: 25

Topic Context
The participants identified a number of barriers to accessing basic education and discussed the relative importance of the barriers. Some postings suggested approaches to removing barriers, while other messages challenged the underlying assumption that getting more children in school should be an exclusive goal. A general message throughout the postings asserted that while there may be some general barriers that challenge access for many children in the world (transportation, insecurity); other barriers are much more idiosyncratic and depend on context and community.

Key Issues
• **Barriers to accessing education:**
  - Cultural factors, particularly for girls
  - Violence and instability
  - Financial in the form of school fees
  - Weak institutional capacity to support increase in enrollment, including lack of appropriate national planning and budgeting
  - Weak human capital; i.e. lack of qualified teachers
  - Lack of alternatives to the standard, single model of education
  - Weak school infrastructure; i.e. overcrowded schools
  - Accessibility/distance to school
  - Low quality reducing demand and interest in school—resulting in high dropout rates and low persistence rates
  - Lack of demand as a result of weak economies
  - Opportunity costs
  - Schools not responsive to the needs of children with disabilities
  - Leaders not understanding the complexity of the issue
  - Leaders responding to the global push (donor funding) for increased numbers in basic education
  - Socio-economic issues

• **Area of consensus**
  - Importance of demand for education, and the relationship between education and the economy
- Important role that ICT/technology plays in preparing teachers to meet the new needs of learners
- Important to distinguish between barriers that are related to the school system and those that are rooted more broadly in the culture or economy
- If quality and relevance of education isn’t established then the demand for education will drop
- Forward movement in education is not linear; access issues must be tackled on many fronts
- Need for more qualified teachers and administrators
- Need to look beyond just basic education to lower-secondary and secondary—need secondary graduates to be the teachers and leaders of tomorrow

• **Area of disagreement**
  - Relative importance of the supply of education/schools vs. the demand for education/schools
  - Distance to school and the degree to which it poses a barrier to accessing education
  - Focus on increasing the number of children in basic education, vs. improving the whole system

**Existing Successful Approaches/Evidence**
- ICTs and technology
- Teacher driven/developed curriculum delivered through technology
- Policies for whole system development, rather than policy and funding for an increase in basic education alone
- Complementary education models
- Importance of national education plans
- School mapping

**Topics for Future Research**
- Anthropological studies on gender issues and access
- Evaluation of teacher training programs
- Need to identify barriers that persist for different populations so that schools can target efforts to remove specific barriers
- Need to further understand the relationship between barriers
- What factors have the biggest influence on parents’ decisions to send or not send their children to school?
- What is the role of ECCD programs in preparing children for success in school and for successful progression and retention in school?
- What is the relative priority/importance of the identified barriers?
- Barriers to persistence in school vs. barriers to access
- The impact of quality and the perception of quality on enrollment
- Distinction between factors that enable or discourage access to school from the factors that actually motivate students, parents and communities to support schooling in a sustained way
Remaining Questions
• Are there examples of countries that have been able to address cultural factors that inhibit access to education?
• What policies most effectively address barriers, and which policies impact which barriers?
• Given that forward movement in education is not linear and access issues must be tackled on many fronts, what issues need to be prioritized? Is it possible to prioritize barriers on a global level, or are barriers too country/context specific?
• Given that the barriers to expanding education for children are so formidable, how do we maintain resources and attention to promoting access for children with disabilities?
• Are we learning from previous experience? What is different about the current international push for increased access to quality education?

Session 2: Learning and Quality
Dates: January 18-19, 2007
Moderated by: Kenneth Eklindh, UNESCO
Shadow Moderated by: Bidemi Carrol, AED
Approx. # of Participants: 13 unique contributors (not incl. moderators)

Topic Context
The guiding questions for this session probed participants about the relationship between school quality and access, how school quality is best measured, and considered cost-effective means of measuring quality. The contributions touched on some of these issues, but also widened the scope of the discussion. Two broad areas of discussion where (1) factors affecting quality, and means of improving quality and (2) definition and measurement of learning.

Key Issues
Factors affecting quality of education/learning (and implicitly suggestions on how to improve) include:
• Teacher-related
Participants debated reasons for poor quality of education. The relationship between teachers and quality education was an important thread. Poor school quality was explained in terms of poorly trained teachers, lack of motivation by teachers due to poor conditions of service, not enough trained teachers, teacher absenteeism, lack of training on child-centered learning, poor status of teaching profession, etc. Some participants disagreed with the analysis that if you hire and train more teachers, education will be improved. These participants pointed to the fact that in the U.S. real per pupil spending has more than doubled with no appreciable change in the 4th grade reading score.
• Early-Child Interventions
Focus on investing directly in young children within programs that address multiple deprivations. For example, a couple of participants mentioned school feeding programs as hungry children cannot learn.
• Community Involvement
A number of participants suggested relationships between schools and communities are important for building safe and quality learning environments.

- **Access – Quality Tradeoff**
  One participant suggested that the push to get everyone into school with limited resources has led to the reduction in quality. He argues that governments are trying to do too much.

**Measurement of Learning**

There were more questions on these topics than there were answers. Contributions included discussion on the clarification of definitions of learning outcomes, and the importance of providing feedback from assessment back to teachers and parents so that they can help students learn. One participant suggested that learning has been too narrowly construed and suggested definitions of learning must go beyond just cognitive dimension. Along the same vein of broadening the definition of quality, one participant suggested that quality should include education’s contribution to economic growth and productivity. The relation between resources, education for all and quality was brought into the discussion. Some participants pointed out that we too often measure what is easy to measure and call that quality. There is a need to look for skills outside of the traditional perception of education concentrating only on classical subject matters and performances. Along those lines, one suggested that we focus on acquisition of basic skills in critical thinking, reasoning, analyzing, and communication.

**Existing studies**

A few participants provided evidence for their arguments. The following documents/concepts/studies were referred to during the discussion:

- Evaluation of student learning by DevTech (2003) in Benin which showed that teacher absenteeism is a barrier to learning
- One participant provided an example of a monitoring survey of learning achievement from Russia
- For broadening the discussion of learning beyond just the cognitive, one participant referred to the following:
  - Four pillars of Delors [http://www.unesco.org/delors/fourpil.htm](http://www.unesco.org/delors/fourpil.htm)
  - Seven intelligences (Gardner): [http://www.infed.org/thinkers/gardner.htm](http://www.infed.org/thinkers/gardner.htm)

**Topics for Future Research**

See 5 below.

**Remaining Questions**

The questions posed at the beginning of the session are still open. Furthermore, participants raised the following questions:

- How do we define learning?
- How to improve learning within the current constraints (i.e. if you can’t increase resources to pay teachers more or provide better conditions of services, etc.)? What can we do within existing schools to raise performance?
- How do we design curriculum and tests that measure broad skills in critical thinking, communication, etc.?
• What do we know about activities such as team teaching, mentoring, and the role of inspectors in promoting better teaching practices?
• How do we reorganize teaching and learning such that resources lead to learning outcomes – however defined?
• How do we design student assessments that can actually inform teachers and practice as opposed to those that primarily sort, filter or shame and blame?
• Is there necessarily a trade-off between growth, equity, and quality?

Session 3: Quantifying the monetary costs of schooling to households
Dates: January 22 – 23, 2006
Moderated by: Mark Bray and Serge Peano, IIEP
Shadow Moderated by: John Gillies, AED
Approx. # of Participants: 11

Topic Context
The participants identified a range of types of financial and economic barriers to both access and completion of schooling. Some postings specified the exact school fee structure in a given country, while others identified less evident types of financial barriers to both primary and secondary education. It was generally recognized that the non-fee and indirect costs of schooling constitute a heavy burden on poor families. It was also noted that fees at the secondary level are high and have a different structure than those at primary level.

Key Issues
• Areas of Consensus
There is a variance in level and type of expenditures households contribute to education. Cost of education can be separated into formal and informal fees. Secondary education costs should also be considered because they are often higher; and family decisions regarding secondary education may differ from the decisions regarding primary education. More than one participant discussed the combination of removing formal fees while at the same time developing pro-poor policies like scholarship schemes.

• Areas of Disagreement
Views differed regarding families’ willingness to pay for education. Views differed regarding which fees pose the greatest burden on families

Nature of Financial Barriers
• Registration fees
• School fees
• Uniform fees
• Books
• Transport
• Related costs, such as need for birth certificate needed for primary leaving exam.
• Opportunity costs and foregone earnings. Families giving priority to non-school expenditures (death ceremonies, taking a wife)
Level of Financial Barriers

- The cost of education cannot be limited to formal fees and contribution to schools. Buying books and supplies, uniforms are real requirements and students might not be accepted to school without uniform, paying for exams, and transport. Child labor and the forgone earnings for enrolled children is also an issue mentioned. Respondents identified specific monetary costs to attendance at the primary and secondary level.
- The ILO referenced a study in Indonesia that detailed $40/year in total costs for attending elementary school and $123/year in total costs at the lower secondary level. These represent both fee and non fee costs.
- Namibia education is free and compulsory, but schools do collect financial contributions for the School Development Fund. The level varies with the school and community, creating inequality.
- Zambia financial requirements include fees for the PTA, statutory, project, and examination fees. Statutory fees are set at $5 and examination fees at $11. PTA and project fees represent the greatest burden to families. PTA fees, which differ from school to school, may be as high as $222. PTAs also establish project fees, which can also be as high as $222.
- Secondary school costs in a project in Nicaragua were approximately $15/month for fees, $20/month for transport, and $50/year for uniforms, for a total of $300/student per year. This exceeds the average income of rural families in Nicaragua, so the financial barriers to attending secondary school are significant. However, even when these direct costs were paid by an NGO project, the indirect burdens were also significant barriers to persistence (boarding with relatives, loneliness, and depression). In this case, addressing the financial costs may not be sufficient to improve enrollment.

Observations about financial barriers to education

- Financial barriers are ubiquitous. In four countries surveyed in DHS data, between 96% and 100% of students incurred some monetary cost of attendance.
- The incidence and nature of financial costs varies widely by type and region. For example, in Nigeria, only a small proportion of students spend money on transportation, but the average cost was $100. For these students, the barrier is quite significant. Other costs are much smaller, but apply to virtually all students.
- It is important to differentiate between mandatory and discretionary costs. Discretionary costs have much more variation (such as for PTA funds).
- Costs vary considerably depending on the SES characteristics of the school (rural, urban, region). Tuition fees in Nigeria ranged from $10 - $66 dollars per student.
- Families may be prioritizing other family or cultural expenses over payment of school fees. Field evidence from Benin indicated that school expenses were a lower priority than elaborate burial or taking a wife, even though the school costs are considerably smaller.
- Household survey data is a key source of insight into fees, because the fees paid may be different than the mandated in official guidelines. It is useful for policy purposes to make the distinction between payments to schools (fees, PTAs, development funds...), expenses required by school attendance (uniforms, books, supplies), and other expenses related (transport, food...). Household surveys should make a clear
distinction between these categories. Household surveys should also authorize the distinction between payments to public and private schools.

- Greater reliance on household contributions may result in greater inequality. Evidence from Ecuador indicated that household contributions increase as government spending decreases. In extreme cases, household contributions can be as high as the official government expenditures. However, household contributions are less equal – richer schools get more money from families, resulting in greater inequality in educational opportunity.
- Rent seeking by teachers is a significant factor, but difficult to quantify.

Topics for Future Research

- Assess variation in expenditure levels in different parts of the country to be able to differentiate policy response. Differentiation to identify which costs of schooling present the most substantial barriers to which segments of the population.
- The impact and use of fees, in a school development fund, on increasing disparity of educational opportunity.
- Comparison of household expenditures with official fee data to determine whether the practice reflects the policies.

Remaining Questions and Policy Implications

Classification of expenditures and financial barriers into direct school support costs (fees) and indirect costs of attending (transport, food, books) may provide a basis for policies and support that differentiate issues of ability and willingness to pay.

Session 4: A Data-Based Assessment of Efforts to Remove Barriers

Dates: January 24-25
Moderated by: Desmond Bermingham, FTI
Shadow Moderated by: Karen Wiener, HGSE
Approx. # of Participants: 8

Topic Context

The participants identified a number of programs that have been shown to be successful in overcoming barriers to education. However, limitations of these interventions were also discussed, such as the low quality of education being provided or challenges with implementation and sustainability.

Key Issues

- Area of consensus

The use of incentives for education was one that was discussed by several participants. This typically involved removing the direct and indirect costs of education to increase school attainment. Community support was another issue raised by several participants: a community school program was noted that was successful at overcoming the barrier of school perception, whereas a scholarship program was not successful in a community that did not support the program. For many interventions, there appeared to be additional benefits beyond the immediate goals of the programs, such as increasing enrollments of the non-target population.
• **Area of disagreement**

While evidence of success was provided for scholarship programs, conditional cash transfer programs (CCTs), and interactive radio instruction (IRI), other participants cautioned that this success was not universal. Programs that provided incentives (such as food, books, or oil) were not successful in the long-term due to lack of agency coordination, lack of monitoring and evaluation, and short-term planning. Enrollments may have increased initially but they were not sustained. An IRI program in Balochistan also appeared to be unsuccessful due to the impractical and irrelevant nature of the programs.

Additional concerns were raised about CCT incentive programs. For a large investment, only modest gains in school attainment were achieved, and, more importantly, learning outcomes were not taken into account. This raises the question about the goals of an intervention, for increasing enrollment may not lead to increased school attainment, and increased attainment may not lead to increased learning.

**Existing Successful Approaches/Evidence**

Some programs that were suggested as successful approaches to removing barriers to education include girls’ Scholarships in Kenya, interactive radio instruction (RADECO), addressing both indirect and direct costs for children engaged in child labor, conditional cash transfers in Latin America, and providing non-monetary incentives such as oil or food in Pakistan. The Comprehensive Schools Project in Egypt demonstrated the benefits of community participation and altering perceptions about education. However, one caveat to all of these programs is what qualifies as ‘success’, as small gains may have been made at a large financial cost, gains may not have been sustainable in the long term, or factors such as educational quality and learning were not considered.

**Topics for Future Research**

Given the paucity of data on removing barriers to access in education, we would suggest that this area be given priority attention in education research programmes over the next few years.

Key questions should include:

• Looking at country success stories to review what other programs and interventions have successfully increased school enrollment, attainment, and learning.

• Programs that boost enrollment, such as conditional cash transfers, must also be investigated as to the additional impact they might have on school quality.

• With mixed reviews on many of these programs, investigating the factors that lead to success or failure may help to pinpoint the necessary components required for these interventions (e.g. donor support, program relevancy, community buy-in).

• Examining the influence of community support for the long-term success and sustainability of interventions.

**Remaining Questions**
Given that only successful programs are usually reported in the literature, how can we also learn about those that did not work so as not to repeat the same mistakes? How can effective programs be scaled-up so that they also run effectively? Luis Crouch’s in Session 1 referred to findings that whether children or parents thought a school was ‘good’ was a key factor in their decision to go school or not. Should we conduct more research into ways of using surveys to increase local accountability to improve schools and remove a key barrier to access?

Session: 5A - School Fee Abolition Initiative - Quality
Dates: 1/26-1/29
Moderated by: Dina Craissati, UNICEF
Shadow Moderated by: Hansell Bourdon, AED
Approx. # of Participants: 4

Topic Context
The questions for this topic centered on the fact that removing school fees abruptly often causes a decline in quality education due to additional stress on existing infrastructure and administration systems. The main question asked was, what must be done to preserve quality while abolishing school fees?

Key Issues
- **Area of consensus**
  There was consensus that removing school fees is an important step toward increasing access and equity but that it alone is not sufficient, especially for student retention. Other inputs such as school feeding programs, scholarships which go beyond paying of fees but offset other opportunity costs, more teaching materials, increased teacher training, strengthening of community participation and greater Government spending per pupil are needed. One participant underlined that school fee abolition needs to be therefore planned within system wide reforms. Another participant pointed out that in order to positively affect education quality, Governments, schools and communities need to work together as implementing partners. Another area of consensus was that programs differ depending on the region. It is apparent that many of the reasons for students dropping out are different in rural settings than in urban.

- **Area of disagreement**
  While there was no real disagreement in this discussion, one participant highlighted the fact that supplemental programs that have been designed to complement free primary education have not been successful, especially in the rural areas. The example given was the MIITEP program for teacher education in Malawi. A participant argued that assuring quality will not be solved through parallel programs but rather through greater Government spending for replacing fees and for dealing with the surge in enrolment.

Existing Successful Approaches/Evidence
No specific examples that have successfully balanced access and quality have been presented. The MIITEP program in Malawi was cited as marginally successful and it has
since been discontinued. There was evidence that scholarship programs have had some success in increasing access but they do not ensure retention and completion.

**Topics for Future Research**
One of the participant suggested that school fee abolition needs to be implemented gradually over time to allow the education system to better adjust to increases in enrolment, especially with regards to the training of new teachers. The phasing of school fee abolition constitutes a key area of research.

**Remaining Questions**
How can school fees be removed without compromising the quality of education? What are immediate measures to be introduced to preserve quality while addressing the surge in enrolment?

**Session: 5B**
**Dates: January 28 – January 29**
**Moderated by: Dina Craissati, UNICEF**
**Shadow Moderated by: Erik Lundgren, AED**
**Approx. # of Participants: 3**

**Topic Context**
This discussion encouraged participants to consider challenges with ensuring equity while implementing school fees abolition policies. Participants identified three case studies: Bangladesh, Kenya, and Papua New Guinea. All of these case studies showed increased enrollment but no substantial gains in quality or equity following school fees abolition.

**Key Issues**
- **Areas of Consensus**
  All participants noted that in order to improve equality in education, each issue (i.e., girls’ education, children affected by HIV/AIDS, poor and rural children) must be targeted and addressed individually. It is important to specifically target under privileged groups. For example, a stipend program can turn into a scholarship program when the burden of meeting the criteria is left on beneficiaries rather than the government taking the initiative to reach the poorer families. There is also a need to address problems with infrastructure, teaching and learning materials, and meeting the teacher shortage with the huge influx of students when school fees are abolished.

- **Areas of Disagreement**
  A participant from Kenya highlighted the importance of bursaries and scholarship programs that are targeted to address gender disparities and those affected by AIDS. However, another participant’s presentation of problems with the Bangladesh female stipend program indicates that there is no agreement on how these initiatives should be implemented to ensure that it reaches the target population and has an effect on equity. Further, these programs are expensive and may not be sustainable in the long-term as participants may become dependent on the program.
Existing Successful Approaches/Evidence
Even though participants discussed cases of school fees abolition efforts from Bangladesh, Kenya and Papua New Guinea, they were not identified as successful approaches. In Bangladesh, stipends to families did reduce the disparities in enrollment, but it is not evident that the program could be sustainable or could improve the quality of education. In Papua New Guinea, school fees were abolished and later reinstated after a new government identified the chaotic influx of new students. With another election approaching in PNG in 2007, there are again talks about removing school fees in the country.

Topics for Future Research
In general, participants felt that more rigorous monitoring and evaluation is needed. There is also a need for studies on the effects of education on specific target groups. For example, we need evidence on the impact of the Bangladesh female stipend program on fertility control, delayed marriage, employment, self sufficiency and equity.

Remaining Questions
What are some crucial factors that need to be considered to ensure equity while planning school fees abolition policies? Are there school fee abolition guidelines for countries considering abolition?

Session: 5C - School Fee Abolition Initiative - Management and Governance
Dates: 1/29-1/30
Moderated by: Dina Craissati, UNICEF
Shadow Moderated by: Felix Alvarado, AED
Approx. # of Participants: 4

Topic Context
This discussion focused on the management and governance challenges of school fee abolition processes. School fee abolition and the ensuing surge in enrolment involve massive efforts to manage resources and supplies and to run requisitions and disbursements. They require education systems to ensure proper flow of resources, school capacity building and effective participatory mechanisms.

Key Issues
• Area of consensus
There was consensus on the general vulnerability of education systems in weak states when eliminating school fees (especially with regards to ensuring transparency, sustainability and outcomes). One of the participants underlined the need for proper planning and management of school fee abolition. He gave the example of Papua New Guinea (PNG), where school fees were abolished and later reinstated after a new Government saw the chaotic influx of new students.

• Area of disagreement
One of the participants has raised a management issue with regards to fee abolition that actually overlaps with the financing challenge. He indicated that the real challenge of school fee abolition is how countries can better mobilize and manage domestic financial resources, especially through improved taxation systems. However, the burden of generation of revenue and of sound fiscal management in weak states takes time, and while it can be addressed through capacity development programs, children cannot wait, and funding mechanisms and external support should be put in place in the short term. Another participant also highlights that the issue in many countries is one of budgetary allocations to the education (and social services) sector.

**Existing Successful Approaches/Evidence**
In the United States during the latter portion of the 1800s, participation in public schools increased exponentially when school fees were eliminated and Governments shifted financing to broad taxation. With another election approaching in PNG in 2007, UNICEF will convene a school fee abolition workshop in two weeks with key stakeholders and development partners to support the Government in planning and implementing a sound school fee abolition policy and to discuss the roles and responsibilities of all players.

**Topics for Future Research**
The management and governance interventions that need to accompany school fee abolition and the interface with community participation, sound decentralization and stakeholder involvement.

**Remaining Questions**
What mechanisms for resource management have worked? What roles have civil society, parents, and communities played in resource management? How do states with weak fiscal management structures cope with school fee abolition processes?

**Session: 5D - School Fee Abolition Initiative - Financing**
**Dates:** 1/30-2/1  
**Moderated by:** Dina Craissati, UNICEF  
**Shadow Moderated by:** David Balwanz, AED  
**Approx. # of Participants:** 3

**Topic Context**
This discussion encouraged participants to examine financing options for school fee abolition in the short and long term. Concerns about governance were raised and a key strategy of transferring funds directly to schools was highlighted.

**Key Issues**
• **Area of consensus**
A participant in the first session states that “before fees are removed, there has to be a way to accommodate the expected increase in enrolment and a way to replace maintenance fees for schools.” Session 3 also highlighted the need to factor the costs of secondary education in order to address the needs of the larger cohorts making the transition to post-primary education. Another participant in the previous session on the
management challenge of school fee abolition has raised a key question with regards to the financing challenge: “School fee abolition requires better mobilization and management of domestic financial resources, especially through improved taxation systems.” A participant, also in the previous session, indicates that the issue in many countries is one of budgetary allocations to the education (and social services) sector. There is a need to improve Government and Ministry Education resource management system (to reduce wastes and corruption) as part of the strategy of abolishing school fees in Papua New Guinea. A participant introduces a very key strategy in this regard: the development of effective mechanisms of transferring funds directly to schools and the empowerment of local school personnel in managing these funds and in making decisions about enhancing school quality and learning.

• Area of disagreement
One of the participants has highlighted the importance of donor financing to secure the gains made through FPE until the returns to the household and national economy take effect. He proposed to explore the option of financing to primary education through EdInvest (an IFC group that supports private sector investment in the education sector), especially for non-HIPC countries. Another participant does not see a potential for IFC support in low-income countries at the primary level because of the difficulties these would have to get the collateral required by IFC standards. He indicates that while the issue of improved fiscal systems is important for sustainable financing of primary education, it is not so pertinent for school fee abolition because tuition charges are well within the budget capacity of even the poorest countries. He highlights the case of Haiti as an exception, but one could also add the Democratic Republic of Congo as another (households co-finance directly 50% of teacher salaries through school fees). Furthermore, while the replacement of fees could be within country budget capacity, several countries indicated in the dialogues organized by SFAI that the main issue with regards to the financing of school fee abolition is that of financing the surge in enrolment that results in fee abolition. Planning for fee abolition needs to factor budgetary considerations for increases in the needed number of schools or classes, material and supplies, and above all the recruitment of new teachers.

Existing Successful Approaches/Evidence
A World Bank Report was quoted on funding strategies: “PRSPs/MTEFs together with Heavily Indebted Poor Countries (HIPC)[Initiative], [can help] ... ensure a protected resource envelope and increased funding for primary education.”

Topics for Future Research
A key area of research has been highlighted: “I would like to see the issue of school fee abolition as the starting point for a much broader consideration of a readjustment of how donors provide support to countries--moving away from central support as the principal modality toward transfers of funds directly to schools. For instance, if up to half of external financing for education were to be made available directly at the school level (preferably transiting through MinEd budgets), this could have an enormous transformative role in empowering local school personnel to make decisions about how to enhance learning, etc.”
Remaining Questions
Regardless of funding streams - how to improve management systems, particularly in countries where corruption is persistent? What mechanisms are available/work in getting funds directly to schools?

Session: 5E - School Fee Abolition Initiative - Policy development and political choices
Dates: 1/31 - 2/1
Moderated by: Dina Craissati, UNICEF
Shadow Moderated by: Jessica Jester Quijada, AED and Carolyn Pugliese, AED
Approx. # of Participants: 6

Topic Context
This discussion encouraged participants to examine country experiences and lessons learned on the ways in which school fee abolition processes have been thought out and planned within strategic and sustainable education policy frameworks.

Key Issues
• Area of consensus
There is consensus that continued technical and financial support from the donor and international community is needed to sustain school fee abolition policies because of the burden the policy places on governments to cover all of the expenses of running the education system in the short term.

• Area of disagreement
A concern was raised with regards to the public/private provision of education. The example of Kenya was cited, whereby fee abolition resulted in transfers from private non-formal schools to overcrowded Government schools, which in turn triggered a movement back to private schools (because of the perceived deterioration in the quality of public schools). This is a very complex issue that needs to factor several questions with regards to private schools. A participant rightly pointed that the data on such transfers and in general on enrolment in private, non-formal, non-registered schools is not complete.

Existing Successful Approaches/Evidence
Zambia’s experience was accompanied by a number of successes, such as increased enrollment and pupil retention. However, studies in Kenya found that the increases in enrollment could be attributed to children transferring from private schools to government schools.

Topics for Future Research
There is a need to determine the extent of private provision of schooling, particularly in poor areas, in order to adequately consider introducing a policy of school fee abolition. School mapping is key before any policy on the private provision of education is devised. There are different types of private schools that range from community-based schools to for-profit schools. It is also not straightforward that private schools provide better quality
and that quality private schools reach the majority and vulnerable. Furthermore, one needs to differentiate between schools that are supported by dynamic communities (through monetary or in kind contributions) and schools set up by communities because these have no choice.

Remaining Questions
Where will the necessary financing come from once school fees are removed? Are donors willing to invest in the long-term financing of school fee abolition? As a new FTI country, Papua New Guinea wants to know how to leverage FTI’s technical expertise to better plan for school fee abolition.

Session 6: Summary and Way Forward
Dates: February 2, 2007
Moderated by: Robert Prouty, FTI
Shadow Moderated by: Joe DeStefano
Approx. # of Participants: 14

Topic Context
The moderator provided a summary of the main points of the discussion and encouraged participants to suggest bold plans for how to move forward.

Key Issues
• Area of consensus
Participants suggested that while fee abolition is critical to achieving universal primary education, and every child has a right to attend school free of charge, removing fees without a plan can do more damage than good. Specifically, removing fees will not likely success without adequate attention to quality and learning outcomes. Participants also agreed that the solutions are country and context specific.

• Area of disagreement
While many participants agreed that moving funds to the local level is key to improving education quality, others cautioned that the national government must stay involved and moving the money to local level may in fact result in more corruption. There was also disagreement on whether or not those who are willing and able to pay should be paying fees. As a follow-up to this point, one participant highlighted the need to find ways to effectively generate and utilize resources from all sources: governments, communities, and those families who are willing and able to pay.

Topics for Future Research
Participants agreed that there is need for more research, particularly on learning outcomes. There was also a suggestion to move the discussion forward by bringing in developing country teachers as a key group to discuss how to achieve effective learning given resource constraints.
ANNEX 2: BACKGROUND DOCUMENTS

The following is a list of documents that were available online during the discussion as background documents.

Session 1: Barriers to Accessing Basic Education


Session 2: Learning and Quality


Session 3: Quantifying the Monetary Costs of Schooling to Households


Session 4: A Data-Based Assessment of Efforts to Remove Barriers


**Session 5: School Fee Abolition Initiative (SFAI), An Effort to Accelerate Movement Toward EFA by Reducing the Monetary Costs of Schooling**


ANNEX 3: SURVEY RESULTS: PARTICIPANT PROFESSIONAL AFFILIATION *

The following table indicates participant professional affiliation. Participants were asked to complete a survey to determine professional affiliation.

<table>
<thead>
<tr>
<th>Professional Affiliation</th>
<th>Number of Participants</th>
</tr>
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<tbody>
<tr>
<td>Multilateral and Bilateral Donor Agencies</td>
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<td>Ministry Official</td>
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<td>Non-governmental Organization</td>
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<tr>
<td>Researcher/Academic</td>
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<tr>
<td>Teacher</td>
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<td>Other</td>
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* As noted in the membership information form and survey. (n = 166)
ANNEX 4: PARTICIPANT INFORMATION: COUNTRY AFFILIATION*

This annex provides information on the number of participants who participated from countries around the world.

<table>
<thead>
<tr>
<th>Country</th>
<th># of Participants</th>
</tr>
</thead>
<tbody>
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<td>Bangladesh</td>
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<td>Brazil</td>
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<tr>
<td>Canada</td>
<td>1</td>
</tr>
<tr>
<td>China</td>
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<td>Colombia</td>
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<td>Ethiopia</td>
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<td>France</td>
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<td>Georgia</td>
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<td>Ghana</td>
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<tr>
<td>Haiti</td>
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<td>India</td>
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<td>Japan</td>
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<td>Malaysia</td>
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<td>Morocco</td>
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<td>Namibia</td>
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<td>Pakistan</td>
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<td>Papua New Guinea</td>
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<td>Philippines</td>
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<td>Russia</td>
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<td>Yemen</td>
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<td>Zambia</td>
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<tr>
<td>Zimbabwe</td>
<td>2</td>
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</table>

*As noted in the membership information form and survey. (n = 166)
ANNEX 5: METHODOLOGY USED FOR POST-DISCUSSION ANALYSIS

This annex provides the methodology used to analyze the frequency of issues as discussed in this report. A content analysis methodology was used with a latent coding of themes identified by two analysts who were knowledgeable about the field of education policy and international development. The methodology included three distinct steps: 1) identification of themes, 2) coding of themes in each post, and 3) identification of relationship between themes and professional affiliation. The analysis was also based on the interpretation of the two analysts; therefore, the findings are subjective in nature and are prone to researcher bias.

Step 1: Two different analysts independently read through the transcripts of the online discussion and identified the major themes that emerged in each post. The themes identified by both the analyst were combined to form a larger list of themes discussed in the posts. A consensus was reached in instances where there was a discrepancy between identification of themes in a post. The following fifteen themes were identified and coded:

1. Monetary barriers
2. Opportunity cost as a barrier
3. Distance to school as a barrier
4. School environment as a barrier
5. Cultural practices as a barrier
6. Language of instruction as a barrier
7. Quality of education
8. Relevance/rate of return to basic education
9. Post primary education
10. Early childhood education
11. Special needs education
12. Planning
13. Public/Donor financing
14. Lack of qualified teachers
15. Need for data and research

Step 2: Following the identification of themes, the analysts mapped out which participants discussed the specific themes. The analysts did not look at how many posts a single participant posted on a particular theme, but did review how many participants posted comments on a certain theme. The basic frequency distribution of discussion around each theme is presented in Annex 6.

Step 3: Participants were then divided into groups based on the professional affiliation information collected from the member profile and the responses to survey questions. This methodological process produced the frequency distribution of themes by professional affiliation presented in Annex 7.
ANNEX 6: PARTICIPANT RESPONSE: ISSUE FREQUENCY*

This annex is based on the number of participants that posted comments related to the identified themes.

<table>
<thead>
<tr>
<th>Issue</th>
<th>Percentage of Participant Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of education</td>
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<tr>
<td>Public/donor financing</td>
<td>32%</td>
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<tr>
<td>Monetary barriers</td>
<td>30%</td>
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<td>Planning</td>
<td>27%</td>
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<tr>
<td>Lack of qualified teachers</td>
<td>25%</td>
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<tr>
<td>Need for data and research</td>
<td>25%</td>
</tr>
<tr>
<td>Relevance/rate of return to basic education</td>
<td>23%</td>
</tr>
<tr>
<td>School environment as a barrier</td>
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<tr>
<td>Opportunity cost as a barrier</td>
<td>21%</td>
</tr>
<tr>
<td>Cultural practices as a barrier</td>
<td>20%</td>
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<tr>
<td>Distance to school as a barrier</td>
<td>18%</td>
</tr>
<tr>
<td>Post primary education</td>
<td>9%</td>
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<tr>
<td>Early childhood education</td>
<td>4%</td>
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<tr>
<td>Language of instruction as a barrier</td>
<td>2%</td>
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<tr>
<td>Special needs education</td>
<td>2%</td>
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</tbody>
</table>

*Note: The percentage is calculated based on participants who posted responses with clear positions on the main issues; therefore, these findings reflect the views of 56 out of the total 166 participants who registered for the event. (n = 56)
ANNEX 7: PARTICIPANT RESPONSE: ISSUE FREQUENCY BY PROFESSIONAL AFFILIATION*

This annex is based on the number of participants with a certain professional affiliation posted comments related to the identified themes.

<table>
<thead>
<tr>
<th>Multilateral and Bilateral Donor Agency</th>
<th>Non-governmental Organization</th>
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<tbody>
<tr>
<td><strong>Issue</strong></td>
<td><strong>Issue</strong></td>
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<tr>
<td>Planning</td>
<td>Quality</td>
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<td>Need for Data/research</td>
<td>Public/Donor Finance</td>
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<td>Opportunity Cost</td>
<td>Monetary Cost</td>
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<td>Culture</td>
<td>Distance</td>
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<td>Quality</td>
<td>Need for Data/research</td>
</tr>
<tr>
<td>Public/Donor Finance</td>
<td>Lack of qualified teachers</td>
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<td>Monetary Cost</td>
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<td>Lack of qualified teachers</td>
<td>Relevance/Rate of return</td>
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<td>Relevance/Rate of return</td>
<td>School Environment</td>
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<tr>
<td>School Environment</td>
<td>Post primary education</td>
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<td>Distance</td>
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<td>Early Education</td>
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<table>
<thead>
<tr>
<th>Ministry Officials</th>
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*Note: The percentage is calculated based on participants who posted responses with clear positions on the main issues. Participants who did not identify their professional affiliation were categorized as others and are not included in this analysis. Participants in the parent groups were also excluded because the sample size (n=1) was too low. Therefore, these findings reflect the views of only 52 out of the total 166 participants who registered for the event. (n = 52)
ANNEX 8: EXCERPTS FROM PARTICIPANT RESPONSES

The following excerpts were taken from the full transcript. The purpose for including these transcripts is to convey the wide range of responses to the topics.

Session 1: Barriers to accessing basic education

“In Papua New Guinea, many girls are not in school because of cultural beliefs and practices. Many people do not see the importance of education for girls because girls eventually marry.”

“The biggest barrier is lack of alternative for poor children to access quality education. Poverty, distance, and cultural practices all contribute to [children not staying in school]. We need to create ‘anytime’ schools.”

“The overarching factor [affecting access to quality education] is financial constraints.”

“One of the most important factors is accessibility. A child does not go to school because the school is far away from his/her village.”

“It is important not to lose sight of the demand-side as well. A growing, technologically dynamic economy generates a strong return to both basic and advanced skills.”

 “[In Afghanistan], the quality of education fails to live up to the standards promised at the start of the reconstruction effort, and families who agreed to send their children to school are questioning the value of education.”

“Overcrowded schools, lack of sanitation facility for girls, lack of friendly atmosphere and teaching methodologies cause children to drop out of school.”

“A critical barrier to accessing basic education is opportunity cost. The decision to pay school fees depends on the alternative use of the household resources and the perceived returns.”

“One of the main barriers is the unwillingness of leaders to learn from mistakes.”

“I have collected historical cases of children who have failed to continue in school and are on the path to dropping out. It has mainly been [attributed] to changes in family circumstances, sickness, loss of job, divorce, family disruption, etc…Almost all have said ‘I am out of school because of fees.’”

Session 2: Learning and quality

“If learning and quality in education can be achieved, teachers conditions of service should be improved.”
“Access and persistence of education depends upon the qualification and professional education of teachers.”

“Focus should be placed on investing directly in the child, especially in the early years if we are to improve learning and quality.”

“Quality has always been difficult to define and measuring it is even more difficult.”

“Teacher shortages remain major issues in education. The trend is to recruit as many teachers, even if they do not have the necessary qualifications [needed] to respond to expanding enrollment.”

“The quality of education more broadly needs to be considered by asking what contribution to productivity and economic growth is the current education system making through the skills it develops and the relevant knowledge it generates?”

“More money for teacher salaries, more money for materials and technology, etc. will not translate into better outcomes unless the fundamental way in which teaching and learning are organized can be changed.”

“Governments [should] not only announce compulsory education, but [should also] involve parents and communities to make them aware of the importance of education.”

Session 3: Quantifying the monetary costs of schooling to households

“The cost of education cannot be limited to formal fees and contribution to schools. Buying books, supplies, and uniforms are real requirements and students might not be accepted to school without uniform, paying for exams, and transport.”

“The ILO referenced a study in Indonesia that detailed $40/year in total costs for attending elementary school and $123/year in total costs at the lower secondary level. These represent both fee and non fee costs.”

“In Namibia, education is free and compulsory, but schools do collect financial contributions for the School Development Fund. The level varies with the school and community, creating inequality.”

“Zambia financial requirements include fees for the PTA, statutory, project, and examination fees. Statutory fees are set at $5 and examination fees at $11. PTA and project fees represent the greatest burden to families. PTA fees, which differ from school to school, may be as high as $222. PTAs also establish project fees, which can also be as high as $222.”

“Secondary school costs in a project in Nicaragua were approximately $15/month for fees, $20/month for transport, and $50/year for uniforms, for a total of $300/student per year. This exceeds the average income of rural families in Nicaragua, so the financial barriers to attending secondary school are significant. However, even when these direct
costs were paid by an NGO project, the indirect burdens were also significant barriers to persistence (boarding with relatives, loneliness, and depression). In this case, addressing the financial costs may not be sufficient to improve enrollment.”

**Session 4: A data-based assessment of efforts to remove barriers**
“Parent and community buy-in might be a necessary for an incentive program to be effective.”

“Bosch (1997) wrote a great article about Interactive Radio Instruction, summarizing evidence from multiple programs throughout the world over the last few decades which show that IRI can have a substantial (and cost effective) impact on learning, while also closing poverty and gender gaps.”

“From a purely educational standpoint, the benefits of CCTs are by no means as clear as widely perceived. One issue raised is the remarkably small net gains in school attainment observed in programs operating at national scale, in view of the very large subsidies being provided to families. Part of this problem reflects weak targeting, so that most of the benefits go to families who would have kept their children in school without the program; better targeting might increase this dimension of impact. The voluminous evaluations of these programs have paid little if any attention to their impacts on children’s learning.”

**Session 5 (A, B, C, D, E): SFAI, an effort to accelerate movement toward EFA by reducing the costs of schooling**
“An obvious solution to maintaining quality while removing school fees is to take a holistic approach and carry out a system wide education reform. This would include improving teacher training, curriculum reform, provision of enough teaching and learning materials, among many other things. [In Malawi,] the mixed-mode approach was not entirely successful (pre-service and in-service training) as there was a lack of training for all involved and poor capacity to support a complex system.”

“Efforts to remove barriers in accessing quality basic education start with the simultaneous efforts of government, community and schools (as three partners).”

“In the short term, efforts need to be made for the mobilization of increased, predictable, transparent, and efficient external development assistance to education.”

“When fees are eliminated in weak states, then a burden of sound fiscal management (including generation of revenue, not just handling of expenditures) is placed on a state apparatus that in many instances is unable to handle it.”

“School fee abolition policy leaves government with the burden of meeting all the expenses of running the education system. We shall need continued technical and financial support from the donor and international communities for us to sustain the policy.”
“It might be that parents would prefer scholarships or vouchers which they can use in existing low-cost private provision, rather than simply free places in government schools, which have no accountability towards them.”

“Appropriate documentation and information systems are then needed to coordinate the equitable distribution and timely receipt of funds to minimize corruption.”

Session 6: Summary and the way forward

“I, for one, question whether we are going to be able to reach universal primary education in the years to come, without abolishing fees, but I also recognize that unless we come up with some more innovative, urgent ways of ensuring the availability of funds at the school level, fee abolition can also do damage. Fee abolition is also unlikely to succeed without much more urgent attention to improving learning outcomes.”

“Schooling is never 'free' - someone has to pay the costs, and I find it helpful to makes distinctions, e.g. between direct, indirect and opportunity costs. With direct fees per se, for example, historically, countries almost always reduce and ultimately eliminate direct school fees with economic and social growth. Most 'developing' countries do not have formal school fees. Indirect costs, however, often remain, and may even increase with fee abolition; this is an example of the complexity of this topic and the need for sound planning to avoid negative, unintended consequences. Then there are opportunity costs.”

“Free primary and compulsory education is a human right that has been affirmed in numerous rights treaties and recognized by governments and the international community as pivotal in achieving the EFA goals and MDGs.”

“The hard truth is that there is an absolute shortage of the resources needed to provide quality education to all. Per student expenditures in most countries are already quite low relative to the needs to address access, let alone quality. Donor transfers, however creatively and efficiently structured, will not overcome this…this means that we need to find ways effectively generate and utilize resources from all sources: governments, donors, communities, and those families who are willing and able to pay.”

“While I see the value in devolving a certain level of responsibility directly to schools - and not just token responsibility, but something attached to expenditure decisions, I am wary of working around the ministries of education too much. My experience in Madagascar showed that the ministry of education had a good deal of capacity and experience that was useful in making decisions about how schools should be run at a lower level - knowledge about statistics or financing, for example. If you remove this layer, no one can make allocative decisions about which regions or schools need what because no one can compare the trade-offs at each level.”

“Some access issues are clearly very, very tricky, but in most places I would bet that enrollment rates could go pretty high with good quality schools that are close to kids' homes: curriculum, teacher preparation/professional development, classroom-level assessment, and incentives that work.”