

**THE IMPLEMENTATION OF UNIVERSAL PRIMARY
EDUCATION IN UGANDA**

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THE IMPLEMENTATION OF UNIVERSAL PRIMARY EDUCATION IN UGANDA

By

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DEDICATION

This study is dedicated to my dear parents, Mrs. Nsereko Magaret and Mr. Nsereko Lawrence. Who without their support, I would not have completed this study. Thank you.

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ABSTRACT

Since independence in 1962, the education system in Uganda has comprised four levels under the control of the Ministry of Education and Sports, namely, the pre-school, primary education, post-primary education and higher education. In 1986, the National Resistance Movement formed a series of commissions to investigate the functioning of the Ministry of Education and Sports. Subsequently, the Education Policy Review Commission was established and made the recommendation to universalise primary education. In 1996, the President announced free education for all with the main components including the provision of free education for a maximum of four children per family, and the removal of school fees in primary schools from grades one to seven. The main goal was to provide for the minimum necessary facilities and resources to enable all Ugandan children of school-going age to enter and remain in school until the primary cycle is completed.

However, the implementation of Universal Primary Education in Uganda has been met with various challenges. The current planning and organising framework does not support its implementation with communication and coordination challenges cited as most problematic. This study focuses on proposing a planning and organising framework that will address the issues regarding policy implementation, coordination and communication. Specifically, the study will focus on:

- a) describing the internal and external environment within which Universal Primary Education in Uganda is implemented;
- b) exploring the planning and organising challenges hindering the implementation of Universal Primary Education in Uganda; and
- c) proposing a comprehensive planning and organising framework to support the implementation of Universal Primary Education in Uganda.

The study employs a qualitative approach and data is collected through the use of an extensive literature review supported by qualitative interviewing of key role-players employed by the Ministry of Education and Sports in Uganda. International best practices are used to determine the planning and organising requirements for successful implementation. The study proposes the establishment of a Department of Primary Education responsible for ensuring the appropriate involvement of all role-players in the planning and organising functions. The establishment of such a department will ensure that monitoring and evaluation, accountability of finances and effective communication are achieved. By placing emphasis on the planning and organising requirements for implementation, the aim of providing free education to all Ugandan children might be achieved.

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LIST OF ABBREVIATIONS

ABEK	Alternative Basic Education For Karamoja
BEUPA	Basic Education for Urban Poverty Areas
BITVET	Business, Technical Vocation Education Training
BRAC	Bangladesh Rural Advancement Committee
CAO	Chief Administrative Officer
CCTs	Coordinating Center Tutors
COPE	Complementary Opportunities in Primary Education
DEO	District Education Officers
ECD	Early Childhood Development
EFA	Education For All
EPRC	Education Policy Review Commission
ESA	Education Standards Agency
ESIP	Education Strategic Investment Plan
ESSP	Education Sector Strategic Plan
FPE	Free Primary Education
FFE	Food For Education
GEM	Girls Education Movement
GLE	General Law of Education
IMU	Instructional Materials Unit

Kshs	Kenya Shillings
MIITEP	Malawi Integrated In-service Teacher Training Programme
MoEST	Ministry of Education Science and Technology
NAPE	National Assessment of Progress in Education
NGOs	Non-governmental Organisations
NRM	National Resistance Movement
PAF	Poverty Action Fund
PEAP	Poverty Eradication Action Plan
PEDP	Primary Education Development Programme
PIASY	Presidential Initiative on Aids Strategy for Communication to the Youth
PLE	Primary Leaving Examination
PTAs	Parent Teachers Associations
PTI	Primary Teacher Institutes
PSQL	Primary School Quality Levels
RDC	Resident District Commissions
SEP	<i>Secretaria de Education Pu'blica</i>
SFG	School Facilities Grant
SIP	Secretariat of Public Instruction
SMC	School Management Committee
TDMS	Teacher Development Management Systems
UPE	Universal Primary Education

UNEB Uganda National Examination Board

URC Upazilla Resource Centers

USAID United States Agency for International Development

CHAPTER 1: GENERAL INTRODUCTION

1.1 INTRODUCTION

Universal Primary Education (UPE) in Uganda has experienced a number of challenges since its inception in 1997. To overcome these challenges, various initiatives have been taken by the government of Uganda through the Ministry of Education and Sports so as to facilitate the achievement of Universal Primary Education (UPE). Among them include, the initiative to support girl child, initiative to provide instructional materials to schools, the comprehensive programme to improve quality in primary schools and the initiative to improve education in outreach areas among others. Arguably the above initiatives indicate that Primary Education has been a priority in the Ministry of Education and Sports.

However, irrespective of the above initiatives, according to the 3rd joint monitoring and evaluation exercise that was conducted in 2009 (Ministry of Education and Sports 2009a: viii), the implementation of Primary Education is still constrained. There is still inadequate capacity for effective accountability of financial resources, persistent shortages in the infrastructure implementation, inadequate community support, and limited communication amongst stakeholders, poor school management and poor teacher management among others. Consequently, the above challenges have continuously raised questions about what their real causes are. Therefore for the purpose of providing answers to these questions, the research assesses the extent to which the Ministry of Education and Sports is applying the planning and organising functions in the implementation of UPE in Uganda. The methodology adopted was qualitative research in nature using interviews, and documentary reviews as instruments of data collection.

1.2 BACKGROUND AND DEVELOPMENT OF EDUCATION SECTOR IN UGANDA

Since independence in 1962, the education system in Uganda has been comprised of four levels under the control of the Ministry of Education and Sports which trains, registers and supplies all required teachers, prescribes a national curriculum and provides textbooks, administrators and inspectors. These levels of education include pre-school, primary education, post-primary education and higher education as will be discussed below (The Education (Pre-Primary, Primary and Post Primary) Act no 13 of 2008).

Pre-school is comprised of kindergartens and nursery schools mainly run by private agencies and individuals preparing children for primary school. Pre-school education provides education to children aged between two to five years. The financing of this type of education is the responsibility of the parents or guardians. To ensure success, the government provides guidelines on minimum standards for school buildings, equipment and the curriculum for teachers' training to ensure that the teachers who teach in pre-primary have necessary qualifications (The Education (Pre-Primary, Primary and Post Primary) Act no 13 of 2008).

Primary education is offered by both the private primary schools and government aided primary schools. It is a seven year course that provides basic education leading to the award of Primary Leaving Examinations (P.L.E) certificate in four subjects which include English, Mathematics, Science, and Social Studies. However, there are other subjects that are taught although not examined which include Art and Craft, Local Languages, Physical Education and Music. (The Education (Pre-Primary, Primary and Post Primary) Act no 13 of 2008)

The Post-Primary education level includes secondary and tertiary education. Secondary education is divided into two levels: four years of lower secondary – also known as

Ordinary level ('O' level) – leading to the award of Uganda Certificate in Education (U.C.E); and two years of upper secondary – also known as Advanced level ('A' level) – leading to the award of Advanced Certificate in Education (U.A.C.E). Tertiary education on the other hand takes a proportion of secondary school leavers who are taught various crafts and skills for duration of three years. These include technical schools and institutes, primary teacher training colleges which train primary school teachers, national teachers colleges, national colleges of business studies, and the Uganda colleges of commerce (Bitamazire 2005:3). As the fourth level of education, higher education consists of universities. Just like the other levels, higher education is offered by both private and government aided universities. To date, Uganda has five government owned universities with over 4000 students and offer different courses sponsored by the government, based on merit. These include Makerere University, Kyambogo University, Mbarara University, Gulu University and Busitema University (Ministry of Education and Sports 1999:4; Bitamazire 2005:3).

Between 1971 and 1985, Uganda's education system was disrupted by the political and economic instability caused by military coups and the resultant general insecurity. The status of the primary education sub-sector in Uganda was characterised as extremely poor. For instance the allocation of funds to the education sector declined from 3.4% to 1.4% of the annual budget between 1971 and 1985 while most of the burden of financing education was left for the parents to bear. Infrastructure had been completely destroyed and the teachers' salaries had fallen below the minimum wage. Above all management and planning of education was inadequate at all levels of education, while the curriculum and related assessment systems were outdated (IOB 2008:39).

In 1986 the National Resistance Movement (NRM) formed a series of commissions to investigate the Ministry of Education and Sports Department. For this reason the Education Policy Review Commission (EPRC) was formed which made the

recommendation to universalise primary education. Referring to this report, the government appointed a committee giving it power to examine the EPRC Report in 1996 and identify recommendations feasible for its implementation (Ministry of Education and Sports 1999:9).

With the growth of democracy in Uganda and the ruling party vying for a second term, President Yoweri Museveni, also a major believer in transformation and modernisation of society through elimination of illiteracy and provision of education for all, believed that it was time for every Ugandan child to receive free education (Ndeezi 2000:1). In 1996, the President announced free education for all with the main components including the provision of free education for a maximum of four children per family, and the removal of school fees in primary schools from grades 1 to 7. The main goal was to provide minimum necessary facilities and resources to enable all Ugandan children of school going age to enrol and remain in school until the primary cycle is completed (Ministry of Education and Sports 2008a:1). This was advanced in the Government White paper on Education's timeframe which stated that Universal Primary Education (UPE) was to be achieved by the year 2000 for grades 1 to 5 and for the entire primary cycle by the year 2003 (Ministry of Education and Sports 2004:9).

According to the Ministry of Education and Sports (1999:10), the main objectives of Universal Primary Education (UPE) are:

- a) to establish, provide and maintain quality education as the basis for promoting the necessary human resource development;
- b) to transform society in a fundamental and positive way;
- c) to provide the minimum necessary facilities and resources to enable every child to enrol and remain in school until the primary cycle of education is complete;

- d) to make basic education accessible to the learner and relevant to his/her needs as well as meeting national goals;
- e) to make education equitable in order to eliminate disparities and inequalities;
- f) to ensure that education is affordable by majority Ugandans; and
- g) to meet the objectives of poverty eradication by equipping every individual with the basic skills and knowledge with which to exploit the environment for both self and national development.

The above mentioned objectives highlight that UPE in general is important and significant for development. Therefore in relation to this research, for the effective implementation these objectives, the management functions such as planning and organising should be the guidelines for UPE to be successful.

1.3 MOTIVATION FOR THE RESEARCH

According to Bitamazire (2005:2) the mission of the Ministry of Education and Sports is to provide support, guidance, coordination, regulation and promote quality education and sports for all persons in Uganda. With this mission in mind, UPE was implemented in 1997. Uganda moved towards a decentralised delivery of primary education with different stakeholders playing part in the management of UPE. The stakeholders include schools, District Education Officers (D.E.O), Chief Administrative Officers (C.A.O) and the central offices at the Ministry of Education and Sports all performing different functions (Ministry of Education and Sports 2005b: 22).

With the help of co-ordinating centre tutors and district education officers, schools develop and implement schools improvement plans, manage the instructional

programmes, staff and answer to the community (Ministry of Education and Sports 2005b:22). District Education Officers work alongside the local government and deliver education services, help allocate resources equally among schools and institutions, and keep local authorities advised of the needs and achievements of schools. They help schools share information and innovations in order to comply with standards and regulations, and provide the community with support and advice on how to hold schools accountable for the performance of students (Ministry of Education and Sports 2005b:22).

The Central government participates in the management of UPE in various ways although the main function is to formulate sector policy and broadly direct financial resources. Other functions include ensuring that the legislative framework reflects the strategic directions, conduct and disseminate research, and support the development of pilot special programmes. The key role players in the central offices with regard to UPE include the Education Planning Department, Education Management Information System which collects, analyses and reports data on schools for use by decision makers, and the Uganda National Examination Board (UNEB) which provides an assessment of strategies on day-to-day classrooms performance and each grade level (Ministry of Education and Sports 2005b:22).

Irrespective of the above, UPE necessitated large investments in the education sector to fulfill the Ministry's mission hence the creation of the Education Sector Investment Plan from 1998 to 2003. The Education Sector Investment Plan's goals included (Byamugisha & Ssenabulya 2005:8):

- a) expanding access;
- b) enhancing the quality and relevance of instruction through procurement of relevant instructional materials;
- c) increasing equity;

- d) enhancing capacity of districts and central government; and
- e) creating a framework for continuous and equitable education provision with appropriate levels of contribution from the public sector and private sector.

In 2004, the Education Management Information System (EMIS) was introduced to help improve the management and planning procedures of the education system. In the year 2004, the Ministry adopted the Education Sector Strategic Plan to run until 2015 as a follow up of the Education Strategic Investment Plan 1998-2003. The main role of the Education Sector Strategic Plan (ESSP) is to guide all sub-sectors in their regular medium-term and annual planning and budgeting exercises. In addition, the Education Sector Strategic Plan (2004-2015) also helps the Ministry to negotiate with government agencies, funding agencies and other actors in the education sector to use their investments in the education sector (Ministry of Education and Sports 2005a:1).

However it is important to note that provision of education for all is a systematic challenge and to accomplish it, all aspects of the Ministry must function interactively. For this matter the Education Sector Strategic Plan (2004-2015) has set out policy objectives, sub-objectives, strategies and activities that the Pre-Primary and Primary sector should follow in order to fulfill the Ministry's mission (Ministry of Education and Sports 2005a:7). These include:

- a) providing an education system relevant to Uganda's national development goals to accommodate increases in the rates of transition between primary and post primary sub-sectors. This can be attained through supporting education programmes targeted towards the disadvantaged children and youth; lowering costs to families through continued supply of capitation grants; expanding and improving primary school facilities; and lowering social-cultural barriers to girls' attendance; and

- b) ensuring that students achieve education goals so that they can participate in the country's democracy and contribute to the workforce. For this objective to be attained, the pre-primary and primary sector has to strengthen and motivate the primary-level teaching force, use pre-primary programmes and other measures to prepare children for the intellectual requirements of primary school and improve the instructional processes that lead to students' achievement of literacy, numeracy and basic life skills.

However, planning alone could not fulfill the mission without financial support. Therefore, there was a need to incorporate financial support for the successful implementation of the programme. This involves government's payment of annual tuition fees for all pupils attending government aided schools. In total, the government pays a threshold of 100 000 Uganda shillings (50 dollars) per month for nine months per school regardless of the pupil enrolment. The UPE capitation grant is channeled to the local governments as a conditional grant which is utilised in accordance with the Poverty Action Fund (PAF) general guidelines for planning and operation. The capitation grant is used for the financing: instructional/scholastic materials like supplementary books and teachers reference books; co-curricular activities like games, music dance and drama; management of the schools; and provision of relevant specialised equipment/ materials (Ministry of Education and Sports 2008b:1).

According to the Ministry of Education and Sports (2008b:3), to acquire the UPE capitation grant, the following requirements have to be met (Ministry of Education and Sports 2008b:3):

- a) “an annual work plan/budget form which is prepared by the local government and submitted to Ministry of Education and Sports for approval prior to the commencement of a new financial year;
- b) a signed letter of undertaking by the Ministry of Education and Sports and districts municipalities prior to the commencement of initial releases of the financial year expressing the commitment of both parties to implementing the UPE work plan and budget;
- c) the Ministry of Education and Sports, districts/municipalities and schools must comply with the conditional ties for transparency and accountability in the utilisation of the UPE grant;
- d) formulated budget by the school staff Finance committee together with the minutes of the relevant meetings must be submitted to the District Education Officer through the division local government;
- e) quarterly progress report;
- f) quarterly reports on monitoring visits; and
- g) cumulative progress reports”.

It is important to note that after the attainment of the UPE capitation grant, the school’s UPE bank account is opened and administered by the chairperson of the board of governors of the school and head teachers. However, the district local governments are responsible for controlling the district UPE bank accounts (Ministry of Education and Sports 2008b:3).

For the Ministry to maintain transparency and accountability in terms of utilisation of the UPE capitation grant, a system has been put in place which involves schools reporting to District Education Officers within one week after the close of the quarter. In turn, the District Education Officers report to the Chief Administrative Officers within three weeks after the close of the quarter and, Chief Administrative Officers reports to the Permanent Secretary of the Ministry of Education and Sports before the last working day of the first month after the close of the quarter (Ministry of Education and Sports 2008b:4).

Irrespective of the above plans, after the Implementation of UPE in 1997, enrolment figures throughout the years increased from 3 068 625 in 1996 to 5 303 564 in 1997 and 6 835 525 by 2003. To support the enrolment levels, access and improvement on the quality of primary education, the Ministry of Education and Sports embarked on (Ministry of Education and Sports 2007b:3):

- a) building more primary schools, which in turn contributed to the improvement of pupil classroom ratio from 106 pupils per classroom in 2000 to 72 pupils per classroom in 2007 (Ministry of Education and Sports 2007b:3);
- b) appointed the Uganda National Examination Board to conduct competency tests known as the National Assessment of Progress in Primary Education (NAPE) to improve the quality of primary education in Uganda; and
- c) in terms of efficiency and improved management of available resources, the Ministry implemented strategies such as (Ministry of Education and Sports 2007c: 39):
 1. training of school management committees;
 2. training head teachers in management;

3. ensuring equitable use of customised performance targets for head teachers and deputy head teachers in primary education sub sector so as to enhance good governance and management in schools; and
4. monitoring and supervision of educational institutions.

The Ministry of Education and Sports is still faced with a number of challenges on implementation of the programme despite the above strategies put forward. The challenges include an overwhelming increase in the enrolment figures that has not been matched with the available resources which remain inadequate, for example school infrastructure, instructional materials, human resources coupled with the low salaries paid to the teachers which leads to high rates of absenteeism from duty (Ministry of Education and Sports 2007b:11). In addition, social factors such as HIV/AIDS, early pregnancies, unemployment, poverty and substance abuse are still evident and impacting on equitable access to UPE (Ministry of Education and Sports 2007b:7; AVSI 2007:13).

This research is therefore motivated by the Education For All goals (EFA goals) based on the World Declaration on Education For All brought forward at the World Education Forum which authorised the Dakar Framework for Action aiming to commit governments to achieving quality basic education for all by 2015 (Ministry of Education and Sports 2007b:1; UNESCO 2000a:8). The EFA goals targeted at primary education include (UNESCO 2000a:8):

- a) “expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children;
- b) ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, have access to and complete, free and compulsory primary education of good quality;

- c) ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life-skills programmes;
- d) achieving a 50% improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults;
- e) eliminating gender disparities in primary and secondary education by 2005, and achieving gender equality in education by 2015, with a focus on ensuring girls' full and equal access to and achievement in basic education of good quality; and
- f) improving all aspects of quality of education and ensuring excellence of all so that recognised and measurable learning outcomes are achieved by all, especially in literacy, numeracy and essential life skills”.

The Dakar Framework for Action states that the ‘heart of Education for All (EFA) lies at country level’ (UNESCO 2000a:8). The above mentioned goals highlight the importance of education in society significant for the development of effective implementation of UPE. In relation to this research, the management functions such as planning and organising should be the guidelines for UPE to be successful.

1.4 PROBLEM STATEMENT

Planning of the education system according to the Ministry of Education and Sports (2007a:2) requires policy dialogue, partnership and participation by the communities. This is to improve the monitoring, supervision and ownership in the education programmes through providing an overview of the sector policy framework, and outlining sector policies that continue to underpin reforms, programmes and activities of the Primary Education Sector (Bitamazire 2005:11).

Prior to the implementation of UPE, different initiatives were planned to achieve quality education such as the Teacher Development and Management System (TDMS), which began implementing reform activities in 1995 to 1998; Instructional Materials Unit (IMU) and Assessment Reform including carrying out a National Assessment of Progress in Education (NAPE) every year to improve teaching and learning process (Ministry of Education and Sports 1999:15).

In relation to the above, the Ministry also implemented Thematic Curriculum in Lower Primary – a policy of placing the books in the hands of the pupils, introducing the literacy hour in the primary schools' timetables, customising performance targets for the head teachers and exposing of children to reading materials to aid the acquiring of reading skills (Ministry of Education and Sports 2007b:9; Aguti 2002:15). This in turn contributed to an increase in the net enrolment ratio from 92% to 92.1%, gross intake ratio from 123.9% to 129.2% and the net intake ratio from 53% to 56% between 2006 and 2007 which are perceived as monitoring indicators by the Ministry of Education and Sports (Ministry of Education and Sports 2007b:2).

Despite the massive expansion in the enrolment levels at primary level and the strategic plans put forward by the Ministry of Education and Sports, the Ministry is still faced by challenges in terms of management. The government of Uganda spends about 30% of the national budget on the education sector and 65% of these funds are invested in UPE on top of what is contributed by other funding agencies like Save the Children from Norway, Action Aid, Irish Aid, Netherlands and USAID/Uganda (Ministry of Education and Sports 2007a: 4).

According to IOB (2008: 52), between 2005 and 2006, the Dutch government alone contributed 20 million Euros to the education budget support and 10 million Euros to

education projects. Despite the heavy investment, the levels of pupil performance in literacy and numeracy are still below average rating 45.6% and 42.6% in grade three and 33.5% and 30.5% in grade six respectively; a problem caused by a lack of planning, monitoring, supervision, and commitment on the part of head teachers and teachers in the implementation of the programme (Ministry of Education and Sports 2005: 25).

The Ministry of Education and Sports also highlights that there are still disparities between rural and urban areas as well as regional imbalances in the provision of educational facilities. There is also a lack of reliable and up-to-date educational data hampering the planning, administration of education and optimum use of resources, gender disparity between male and female enrolment with male learners still dominating at 774 845 and 767 698 female, and the fact that the 50% of UPE capitation grant allocated for monitoring customised performance targets has not been put to use as it is meant to at district level (Ministry of Education and Sports 2007b:7; Ministry of Education and Sports 2007a: 4, Ministry of Education and Sports 2007c: 4; AVSI 2007:13).

According to Murphy (2003: 8), a lot still needs to be done in the Northern part of Uganda where the UPE programme does not seem appropriate, given the civil strife still taking place. Northern Uganda is still one of the underperforming regions with the highest illiteracy rate of 53%, high dropout rates, low exam scores and the worst pupil teacher ratio at 1:200 in Kotido and 1:150 in Gulu.

Irrespective of the above, the Ministry of Education and Sports (2005a:5) states that the first education plan the Education Sector Investment Plan elaborated on the programme approach to planning and implementation which has been more or less institutionalised. Therefore the second plan which is the Education Strategic Sector Plan (2004-2015) shifts emphasis from one of implementing UPE to a more balanced concern of post

primary above all aiming at improving quality of education- what participants learn and how they learn. Within the above context, this research will focus on the following research question:

To what extent is UPE implemented through an appropriate management framework focusing on the planning and organising functions?

1.5 MAIN GOAL OF THE STUDY

The main goal of the study is to examine the impact of both the external and the internal environment on the Ministry of Education and Sports while implementing the planning and organising functions in managing UPE.

1.5.1 Aims and objectives

The main aims and objectives for this research are:

- a) to describe the effects of the internal and external environments on the implementation of UPE in Uganda;
- b) to explore the management challenges as they relate to planning and organising for the implementation of UPE in Uganda;
- c) to propose improvements for a management strategy focusing on effective UPE planning and organising.

1.6 RESEARCH METHODOLOGY

Qualitative methods were employed in this research. According to Trochim and Donnelly (2007:142), qualitative research comes from a long tradition of field research originally from anthropology down to psychology as well as other social sciences. It is defined as

any research that relies primarily on qualitative measures which include: interviews, observation, focus groups and documentary reviews. Strauss and Corbin (1998:10) define qualitative research as any type of research that produces findings not derived at by statistical procedures or other means of quantification. This research ranges from research about people's lives, lived experiences, behaviours to institutional functioning.

In this particular study, the qualitative research methodology provides a deeper understanding of the research problem as well as insight on how key stakeholders in the implementation of UPE relate to the management challenges *i.e.* coordination, communication and limited finances faced in the implementation of UPE. By using qualitative research, new solutions will also be generated as well as detailed data in-line with the research problem which can only be attained by understanding the phenomenon well enough.

1.6.1 Instruments of data collection

With an aim of attaining the research objectives, the following qualitative techniques were used; including interviews and documentary reviews.

1.6.1.1 Interviews

An interview is any person to person interaction between two or more individuals with a specific purpose in mind (Kumar 2005:123). The research will be conducted using in-depth interviews since they involve face to face interaction between the informant and the researcher and seek to understand the informant's perspectives especially those who have actively participated in the area of focus. Therefore to determine the effects of the internal and external environments on the implementation of UPE and to explain the

management challenges in the implementation of UPE. These interviews will involve personnel from the:

- a) Ministry of Education and Sports – Departments: Pre- primary and Primary Education; Teacher Education and Education Planning.
- b) District officials: District Administrative Officer, Chief Administrative Officers, Resident District Commissioners, Local Government Authorities (LC. III and LC IV), and District Inspectors of schools.
- c) School Level- Head teachers.

The reason for using interviews in this research is because they can cover a wider population needed irrespective of the location, disability and gender. Interviews also lead to the formulation of questions as they come to mind about the research problem and are less likely to be misunderstood because of repetition (Kumar 2005:123-124). As the research required the perspectives of those closely involved in the management and implementation of UPE, interview questions were structured in relations to planning and organising functions as represented on Annexure B.

1.6.1.2 Documentary reviews

Unlike interviews and observation, this qualitative instrument is a secondary source of data collection. Documentary review as an instrument of data collection involves a critical assessment and summary of the range of past and contemporary literature in a given area of knowledge. This instrument includes written documents in form of government publications, magazines, newspapers, books, websites and annual reports (Trochim & Donnelly 2007:146).

Documentary reviews in this research will be used to obtain statistics provided by the Ministry of Education and Sports reports and also to highlight management issues. The reasons for using this qualitative instrument is because there are already existing arguments related to the research problem, publications from different writers, books and annual reports on the Ministry of Education and Sports website. These will assist in attaining the research objectives, provide a theoretical overview of the existing research, relationship with the recent research and also show the relevancy in the listed research.

1.6.2 Population

Based on the involvement in the implementation of UPE, the population for this research included:

- a) Ministry of Education and Sports where light was shined on three Departments namely the pre-primary and primary education, planning and primary teacher training. Were by three Commissioners (heads of departments) were interviewed because of their close involvement in the planning, training, organising, financing and implementation of UPE.
- b) The district level, whereby because of the districts officials' role in the formulation of the budget for the UPE, planning, monitoring and evaluation of UPE. Focus was placed on two Districts (Kampala and Mukono) where two District Education Officers, two Chief Administrative Officers, two Resident District Commissioners, two Local Government Authorities (LC. III and LC IV) and two District Inspectors of schools were interviewed.
- c) And last but not least Head teachers representing the school level responsible for making sure that schools commence on time, accountable to the districts, develop operational plans for schools and also act as a link to the community. In this case, two head teachers in two Districts (Kampala and Mukono) each were interviewed.

The reason for this is to determine the cause of the management challenges as they relate to planning and organising for the implementation of UPE in Uganda.

1.7 CONCEPT DEFINITION

This section entails brief definitions of the main concepts used in this research and as discussed below.

1.7.1 Public Administration and public administration

Public Administration which emerged as a discipline in the 19th century is a contested concept that has been defined differently. According to Botes, Brynard, Fourie and Roux (1992:257), Public Administration is divided into Public Administration as a discipline and public administration as an activity. Public Administration as a discipline is further divided into Public Administration as a scientific discipline and as an academic discipline. Public Administration as a scientific discipline is concerned with the implementation of government policy and involves the various government spheres. Public Administration as an academic discipline on the other hand, is concerned with the study of all the scientific disciplines that have a bearing on the contemporary administrative and managerial practices in the public sector (Botes *et al.* 1992:257).

According to Botes *et al.* (1992:257), public administration as an activity involves human activity or activity for the people by the people. It can be defined as a comprehensive and peculiar field of activity, consisting of numerous activities, processes performed by public officials working in public institutions aiming at producing goods and the rendering services to the community (Du Toit & Van der Waldt 1997:61). Public administration according to Stillman (1980:3) relates to the activities of the executive branch of government, deals with formulation and implementation of public policies and involves issues of human behaviour.

Having conceptualised the difference between Public Administration and public administration, in the context of this research public administration as an activity was used. This is mainly because public administration as an activity involves the effective and efficient utilisation of resources with the main purpose of fulfilling public demands. Therefore, if applied with the management functions, public administration could positively contribute to success of UPE in Uganda.

1.7.2 Uganda's Public Service

The Public Service comprises the collective administrative personnel of government, also known as the Civil Service. In Uganda the public service operates under the Ministry of Public Service whose mandate is to develop human resource policies, systems and structures that provide for an effective and harmonised Public Service (Ministry of Public Service 2009 :1). According to section 165 of Constitution of the Republic of Uganda 2005 (Act 21 of 2005), in the Public Service there is a Public Service Commission which is the central agency responsible for staffing, training and other administrative matters related to employment in the Uganda's Public Service. This Commission consists of a Chairperson, a Deputy Chairperson and seven other members appointed by the President with the approval of the Parliament and in case of any misconduct arising from infirmity of mind and incompetence can be dismissed from office by the president (The Constitution of the Republic of Uganda 2005 Act 21 of 2005).

Article 171 of the Constitution of the Republic of Uganda, 2005 (Act 21 of 2005), states that the President after consultation with the appropriate service commission may establish offices in the Public Service of the Government of Uganda. In terms of appointments, the President with the advice from the Public Service Commission, such as the Education Service Commission, appoints the heads of department. The commissions

then appoint the persons to hold or act in any office in the Public Service of Uganda, confirm appointments, exercise disciplinary control and dismissal of such persons (The Constitution of the Republic of Uganda 2005 Act 21 of 2005).

According to article 173A of the Constitution of the Republic of Uganda 2005 (Act 21 of 2005), functions of the head of Public Service are:

- a) giving advice to the President on public service related issues;
- b) management of the activities for permanent secretaries;
- c) keeping an eye on the work done by permanent secretaries;
- d) acting as a go-between with the executive office, the service commission and the public service;
- e) undertaking the implementation of Cabinet and other government decisions; and
- f) other duties conferred to by the President.

After consultation with the Education Service Commission – which was established by the Public Service Commission – the Ministry of Education and Sports was formed with a vision to provide quality education and sports for all. It's mission on the other hand is to provide support, guide, coordinate, regulate, and encourage quality education and sports to all Ugandans in order to promote individual and public development (Ministry of Education and Sports 2008a:1). The Ministry of Education and Sports comprises ten Sectors and Agencies which include: Finance and Administration, Education Planning, Primary and Pre-Primary Education, Secondary Education, Teacher Education, Special needs/Career Guidance and Counseling, Higher Education, Business, Technical, Vocation Education and Training (BTVET), Instructional Materials Unit (IMU), and the Education Standards Agency (ESA) (Ministry of Education and Sports 2008a:1).

The Ministry is headed by the Minister of Education whose responsibility is to ensure that national policies and objectives as stated in the Constitution of the Republic of Uganda 2005 (Act 21 of 2005) are implemented and observed at all levels of education. The Minister also issues statutory instruments regarding UPE, Universal Post Primary Education and Training, management and governance of education institutions. Each department in the Ministry of Education is headed by a commissioner. In terms of managing UPE, the Pre-Primary and Primary Education Department is in charge (The Education (Pre-primary, Primary and Post Primary) Act 13 of 2008; Ministry of Education 2008a:1).

The Education Planning Department is responsible for overall policy planning, formulation monitoring and evaluation of education policies, plans, strategies and guidelines in the ministry for all the various departments. It is assisted by other Ministries including the Ministry of Gender, Ministry of Finance, Planning and Economic Development, Ministry of Local Government and the Ministry of Public Service. As well as the Pre-Primary and primary department responsible for general provision of UPE; the Education Standards Agency and the National Curriculum Development Centre teaming up to ensure education standards through monitoring and evaluation. While The Department of Finance and Administration handles all the finances and Human Resources Development , leaving overall training of teachers; provision of instructional materials to school; and infrastructural development to other departments within the Ministry of Education and Sports as shown on Annexure A (Ministry of Education and Sports 2008b:10).

For the purpose of this research, the Pre-Primary and Primary Education Department will be considered. The reason for this is to critically assess the extent to which the management functions are applied, the policies and instruments that have been put in

place to manage UPE and how effective these policies have been in the Pre-Primary and Primary Education Department.

1.7.3 Education

With regards to education, article 30 of the Constitution of the Republic of Uganda, 2005 (Act 21 of 2005) stipulates that all persons have a right to education. Children, in particular, are entitled to basic education which is the responsibility of the state and the parents of the child. Basic education means the minimum education package of learning made available to each individual or citizen, through phases of 'formal primary education' and 'non formal education' system to enable pupils to be good and useful people to society. Formal education means a package of learning made available by recognised schools and institutions following approved curriculum standards and guidelines. On the other hand, non-formal education means a complementary flexible package of learning designed in consultation with the indigenous community to suit the demands and lifestyles of the community and to enrich the indigenous knowledge, values and skills with particular emphasis to literacy, numeracy and writing skills (The Education (Pre-Primary, Primary and Post Primary) Act 13 of 2008).

1.7.4 Universal Primary Education

UPE means the State funded education programme where tuition fees are paid by government and the principle of equitable access to conducive, quality, relevant and affordable education are emphasised for all children irrespective of gender, race and disability (The Education (Pre-Primary, Primary and Post Primary) Act 13 of 2008). Given the fact that UPE is a partnership between many stakeholders with different roles and responsibilities, proper implementation of the organising and planning functions is crucial

for the success of UPE as this will enable Ugandan children of school going age to enrol and remain in school.

1.7.5 Management functions

Management is the process in which leaders organise, mobilise and utilise available resources to reach their aims and objectives (Ministry of Education and Sports 2005:6). Management is important in all departments as it enables them to reach their desired goals at the highest possible level of productivity, which can be achieved through carrying out certain management functions including planning, organising, leading, coordination and control (Van der Waldt & Du Toit 1997:20).

Management is important in this research as it will help the Ministry to promote quality education and sports for all persons in Uganda to enable national integration and development. The particular management functions of relevance to the study include planning and organising which will now be discussed.

1.7.5.1 Planning

Looking at the existing literature, planning has been defined differently by various scholars. For example, according to Cloete (1998:27), planning is a set of processes which must be carried out to find the best course of action which has been identified and described with policy statement. Fox, Schwella and Wissink (1991:47) perceive planning as the reasoning regarding what is involved in a public institution reaching its objectives in the future if proper assessment of opportunities, threats and taking of correct decisions at present are taken into consideration.

Planning as a management function is very important since it is the stepping stone of other management functions (Smit & Cronje 1992:91). In relation to this research, planning is important as it will contribute to the effective handling of change, provide direction on what, when and by whom action is to take place. Planning will also help head teachers gain an insight in what is expected from them if they act according to the guidelines set in the plan, and also facilitate control by providing means to evaluate if activities performed are in line with the expected standards.

1.7.5.2 Organising

Organising as a management function involves organising people to co-operate towards reaching a common goal (Fox, Schwella & Wissink 1991:72). According to Cloete (1991:112), organising entails identification and alignment of functions and allocating these functions to institutions for workers to attain goals. Components of organising as a management function include: division of work, departmentalisation, centralisation/decentralisation and delegation of authority, and coordination and control (Van Der Waldt & Du Toit 1997:194).

Having analysed the definition and the components in organising it is important to note that for the organising function to be successful, the institutional structure within which UPE is implemented must reflect objectives and plans, powers of the leader, reflect the involvement of the environment and must be efficient and effective.

1.8 CHAPTER OUTLINE

This section of the study provides for the detailed explanations of the five chapters in the dissertation as they serve to present the objectives and findings of the study.

Chapter one of the study outlines the motivation of the research, the problem statement, objectives of the research and the research methodology. It further gives the definitions of concepts that are used throughout the study such as: Public Administration, Uganda's Public Service, UPE and the specific management functions namely planning and organising. All in all, the chapter outlines the framework for the entire research study.

Under chapter two, the study focuses on the external and the internal environmental factors impacting on the Ministry of Education and Sports while implementing UPE. In this chapter, these environmental factors will be identified and discussed.

Additionally, chapter three analyses management challenges as they relate to planning and organising for the implementation of UPE in Uganda.

Chapter four mainly deals with the international best practices in the management of UPE and a comprehensive planning and organising framework of UPE in Uganda thus focusing on the development of a comprehensive institutional framework; and possible solutions to the management challenges as they relate to planning and organising in the implementation UPE in Uganda.

A summary, conclusion of the study, and recommendations are provided under chapter five based on the findings of the research.

1.9 LIMITATIONS OF THE STUDY

Information in this study was obtained through reviewing the literature and interviews from major stakeholders in the implementation of UPE. The fact that UPE was a government

initiative also referred to as the president's "baby" introduced just before the elections in 1997; political influence and bias in some of the stakeholder's responses were among the encountered limitations during the study. It was quite difficult for the interview respondents to answer questions frankly scared that if their names were published, they may lose their jobs. Some information they regarded sensitive and contradictory to what has been said to the public by heads of departments and national level stakeholders. In relation to documentary review, the main challenge that was faced was the lack of concrete-clear-documentation of policies relating to the planning and organising framework for the implementation of UPE in Uganda.

1.10 CONCLUSION

This chapter outlines the problem statement, motivation, goals and objectives of the research. It also provides definitions of the concepts that are used throughout the study. This chapter also stresses the notion that the qualitative methodology of research was used using various avenues including interviews with the stakeholders at national, district and school level. The findings are supplemented by documentary reviews.

The following chapter analyses the external and internal environmental factors impacting on the management of UPE in Uganda.

CHAPTER 2: AN ANALYSIS OF EXTERNAL AND INTERNAL ENVIRONMENTAL FACTORS IMPACTING ON THE MANAGEMENT OF UNIVERSAL PRIMARY EDUCATION IN UGANDA

2.1 INTRODUCTION

The exercising of public administration involves carrying out a chain of actions across the whole range of government functions and does not take place in a vacuum. Various factors influence the practice of public administration both from the external environment within which government ministries operate and the internal environment within the ministries. Cloete (1991:85), states that factors such as the policies of political parties, needs and expectations of citizens, circumstances such as population growth, foreign policy, conflicts, technological developments and gender make up the environment of public administration. McCurdy (1977:174) in Du Toit & Van der Waldt (1997: 110) indicates that the environment of public administration is the basis of problems confronting government institutions. Edwards and Sharkansky (1978:9) state that the environment is the combination of social, political and economic factors that influence policy makers. From the above, it could be concluded that, for any government ministry to succeed and fulfil its mandate, the environment in which the ministry operates need to be analysed. This chapter therefore analyses both the external and internal environments influencing the management of UPE in Uganda.

2.2 EXTERNAL ENVIRONMENT

According to the International Development Research Centre (IDRC) (2009:1), an analysis of the external environment is an attempt to understand the forces outside the institutional boundaries that play a role in the shaping of the institution. Du Toit & Van der Waldt (1997: 114) concur in stating that the external environment is the environment outside an institution and influences the internal environment as well as activities of an institution repeatedly. Given that UPE in Uganda is a partnership between many stakeholders with different roles and responsibilities, the implementation of the policy is

bound to be influenced by a number of external factors and these include political, economic, social and cultural factors as will be discussed below.

2.2.1 Political environment

All ministries maneuver within government legislation and regulations making it complicated to divide the political environment from the daily functioning of government ministries. According to Du Toit & Van der Waldt (1997:104), the political environment affects all public managers' activities through systems of government, the constitution, the bill of rights, the nature of dissemination and implementation of legislation. This section therefore analyses the political environment in which UPE evolves by providing a structure of the policy, principles, stakeholders and the specific legislation and regulations that support or inhibit the development of UPE. The legislation that is discussed includes, the Constitution of Uganda 2005, Act 21 of 2005, the Poverty Eradication Action Plan (PEAP), 2004/2005-2007/2008, the White Paper on the Education Policy Review Commission, 1992, the Education Sector Strategic Plan, 2004-2015, Education Sector Investment Plan, 2004-2015, the Gender in Education Policy, 2008, Early Childhood Development Policy, 2007 (ECD, 2007), the Local Government Act, (1997) and the Pre-Primary and Primary Act, 2008 (Act 13 of 2008).

2.2.1.1 Universal Primary Education Policy

The urge to provide free primary education can be traced back to the United Nations General Assembly of 1948 which adopted the Universal Declaration of Human Rights (Article 26 of the Universal Declaration of Human Rights 1948) stating that "*everyone has the right to education and education should be free for at least the elementary and fundamental stage*". At the time, in Uganda, this was more of a myth than reality as by the time the country was still in the hands of colonialists and the education system reduced to only a few individuals taking part. In 1963, to overcome this problem, the

Education Board Castle Commission was appointed to evaluate the system and identify a solution for improving the education system so that it would equal the demand for manpower in the newly independent country (Byamugisha & Nishimura 2008:99). Although recommendations were made to promote primary education, raise standards of agriculture and technical education, expansion of girls' education and the provision of adult education between 1971 and 1986, little was attained. This was due to the fact that the country underwent a period of political turmoil (Syngellakis & Arudo 2006:3; Tomasevski 1999:17; IOB 2008:39).

In 1986, the National Resistance Movement (NRM) formed a series of commissions to investigate the Education Department. For this reason the Education Policy Review Commission (EPRC) headed by Professor William Senteza Kajubi was established to analyse the education system and propose solutions for the future education system. The Commission recommended policy reforms from primary to tertiary levels and noted that primary education is the stepping stone on which all the other levels of education are built. The recommendation was made to universalise primary education (Tomasevski 1999:17; Byamugisha & Nishimura 2008:99).

In 1990, government reinforced its commitment and need to change the education system at the World Conference on Education For All held in Jomtien, Thailand. The government committed itself to providing universal access to primary education by the year 2000. This commitment was further backed up, in 1992, when the *White Paper on Education 1992* was promulgated and provided for supreme guidance in the education sector. The *White Paper on Education, 2000* recommended a phased approach to UPE, starting with the provision of UPE for the first two years of primary school, inclusion of grades one to five by the year 2000 and full primary education by the year 2003 (Ministry of Education and Sports 2005b:2). However, although tuition fees had been waived, the estimated time frame was too conservative and many children of school going age still had no access to

education. In 1996 the President announced free education to four children per family - a promise the government fulfilled in 1997 after the elections (Ministry of Education and Sports 2008b:1).

2.2.1.2 Aims and objectives of Universal Primary Education

The Ministry of Education and Sports (2008b:1) states that the main goal of UPE is to provide for the minimum necessary facilities and resources to enable Ugandan children of school going age to enrol and remain in school and successfully complete the primary cycle of education. The main objectives of UPE are (Ministry of Education and Sports 2008b:1):

- a) “to establish, preserve and uphold quality education as the basis for supporting the required human resource growth;
- b) to alter society in a fundamental and constructive way;
- c) to provide for the minimum essential amenities and resources to permit every child to enter and stay in school until the primary cycle of education is complete;
- d) to make basic education available to the learner and applicable to his/her needs, as well as meeting national goals;
- e) to make education equitable in order to eliminate disparities and inequalities;
- f) to guarantee that education is affordable by mainstream Ugandans; and
- g) to meet the objectives of poverty eradication by equipping every individual with the basic skills and knowledge with which to exploit the environment for both self and national development.”

Based on the above mentioned aims and objectives of UPE as opposed to the challenges highlighted in the problem statement, and the fact that by fulfilling these objectives the government is one step towards equipping every individual with the basic skills and knowledge, it is imperative for the Ministry of Education and Sports to manage UPE through an appropriate management framework focusing on planning and organising.

2.2.1.3 The structure and implementation of the Universal Primary Education policy

The policy framework for managing UPE in Uganda can be depicted in the UPE policy guidelines pamphlet which was first compiled and issued in 1998. Which later due to the lack of commitment from the stakeholders, the policy was revised and re-issued on the 6th of October 2008 outlining the relevant guidelines on policy, planning, roles and responsibilities of stakeholders in the implementation of UPE. In conjunction with Subsequent to consultation with the relevant stakeholders on ways to improve the management of UPE and aims to strengthen the stakeholders commitment, provide obligatory clarifications on the main policy positions in order avoid imitation, possible areas of role conflict and abandonment of the vital aspects of the programme (Ministry of Education and Sports 2008b: V).

UPE in Uganda is managed in a decentralised system with various stakeholders playing a role in the formulation, implementation, monitoring and evaluation of the policy as provided for in the Local Government Act of 1997 and article 176 of the Constitution of the Republic of Uganda 2005 (Act 21 of 2005). For example the Local Government Act of 1997 provides for, pre-primary, primary, special and technical schools to be managed by district councils with each district having the authority to formulate, approve, and execute its own development plan, register UPE children, and distribute textbooks. In addition to the above, monthly remittances for schools from central government are all channelled through the district administration officer (Ministry of Education and Sports 2004:12; Nakabugo, Byamugisha and Bitheghaire 2008:60).

Despite the fact that the Local Government Act of 1997 greatly emphasises the role of the district towards UPE, other stakeholders also play a part in the implementation of UPE as further explored below.

2.2.1.3.1 District level

The district is the highest level of local government with the district local council, also referred to as LC5, as the highest political office led by the district chairperson elected by universal adult suffrage. Followed by the chief administrative officer as head of Public servants at district level, appointed by the central government Public Service Commission, and responsible for finances and for the implementation of district and central government decisions. Below which are other lower local governments such as municipalities, city councils, town councils and sub counties. Currently there are 79 district councils, one city council, five city division councils, 13 municipal councils, 37 municipal division councils, 98 town councils and 870 sub county councils (Local Government Act of 1997; Bitarabeho 2008:3).

Although district staff operates under the control and supervision of the chief Administrative officer (CAO), in terms of education, below the CAO at the district level the District Education Officer (DEO) is the key official to whom the head teachers approach to organise the salary transfers into teachers accounts and collects school supplies, hand in any reports and receive communication from the National Ministry. Most of the authority to control the affairs of individual schools/colleges is effectively passed on to the head teachers/principals, schools management committees (SMCs) at primary school level and Boards of Governors at Secondary Schools, and the Parent-Teachers Associations (PTAs) (Bitamazire 2005:11).

Despite the fact that the legislative and executive authority is vested in the district council, at the district level, it is the joint effort of the town clerk, district education officers, chief administrative officers, Resident District Commissioners (RDCs), senior education officers, education officers, inspector of schools, assistant inspectors of schools, principle inspector of schools, LC 5 chairman, the Mayor, and school management committees to ensure successful implementation of UPE. Their respective roles and responsibilities are (Ministry of education and Sports 2008b: 11-5):

- a) "monitoring all government programmes;
- b) implementing the UPE policy;
- c) accounting for and disbursement of the UPE grant;
- d) formulation of the UPE budget;
- e) provision of instructional materials to schools;
- f) facilitating transfer of teachers;
- g) inspect schools to ensure quality performance;
- h) ensure successful management of UPE;
- i) ensure that staff capacity is maintained;
- j) carry out remedial and disciplinary action on underperforming head teachers by recommending culprits to the district service commission;
- k) organise seminars and briefings for teachers in order to stimulate their performance;
- l) ensure that the school performance is in line with the minimum standard stated by the department of education standards;
- m) facilitating the transfer of teachers within individual districts;

- n) setting up and supervising the performance of education departments; and
- o) formulating the by-laws for the successful implementation of UPE”.

The district council is then followed by the Sub county level comprising of sub-county chiefs, the local council III and 5 chairpersons, the mayor, school management committees and co-ordinating centre tutors (CCT’s) responsible for (Ministry of Education and Sports 2008b:14):

- a) “interpreting UPE initiates, plans, strategies and government policies for head teachers and teachers;
- b) organising and conducting continuous professional development courses and follow-up support supervision for teachers, head teachers and School Management Committees in areas that need improvement;
- c) carrying out community mobilization and sensitization on education;
- d) initiating resource centers and sustain model schools;
- e) identifying the achievements and challenges faced in schools;
- f) ensuring that funds are received in schools, publically displayed by the head teachers and properly utilised;
- g) approving the school budget and make sure the funds are used to benefit all pupils;
- h) working as a linkage between the school and the community and;
- i) following up demands made by head teachers at the district level”.

2.2.1.3.2 School level

The school level which is also the last level in terms of institutional structure of UPE comprises of head teachers, the teachers and the pupils. They are responsible for (Ministry of Education and Sports 2008b:11):

- a) “making sure that schools commence on time, oversee teachers performance, and offer training for the teachers through workshops;
- b) reporting to District Education Officer (DEO);
- c) putting together short -term education plans in schools;
- d) persuading parents to send their children to school;
- e) planning and upholding discipline in schools; and
- f) putting together teaching guides, work and lesson plans and ensure safety and security”.

Figure 2.1: Structure of the Local government supporting the implementation of UPE.

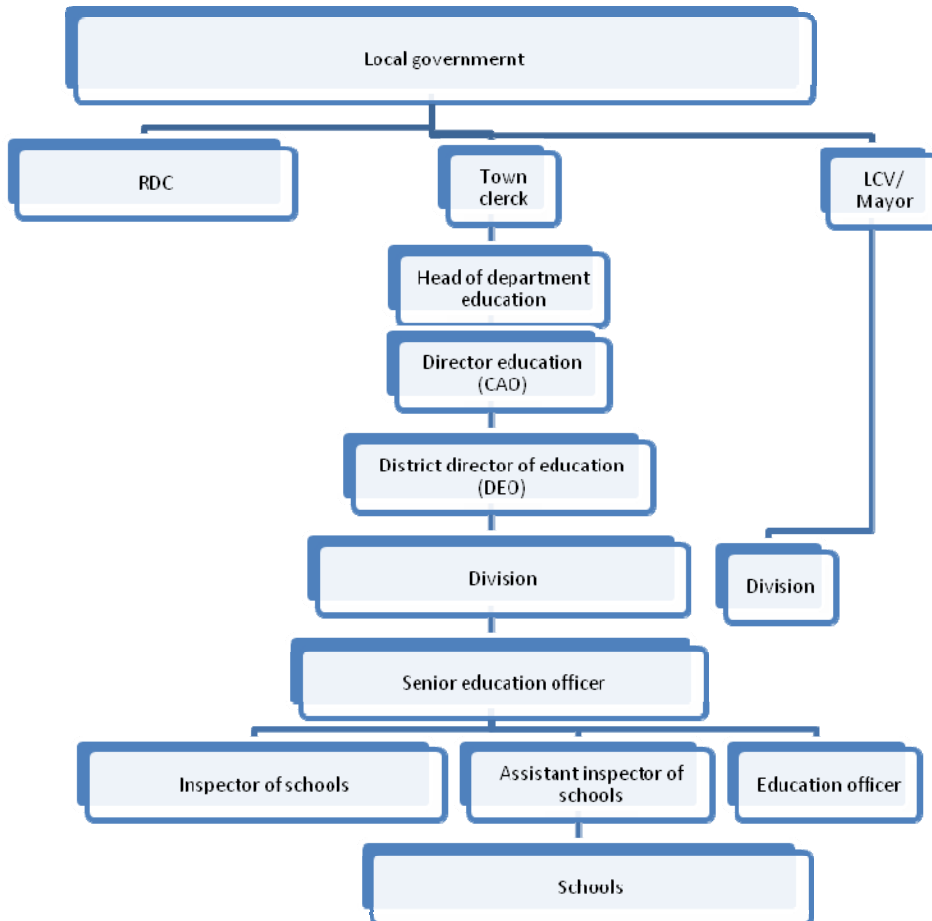


Figure 2.1 clearly depicts the decentralised nature in which UPE is implemented in Uganda and the vast number of stakeholders involved in the implementation. Therefore it can be argued that for the successful implementation of UPE to better the decentralised nature, in which UPE is implemented, a comprehensive management framework focusing on planning and organising is to be expected.

2.2.1.4 Enabling policies, initiatives and programmes supporting Universal Primary Education

This section briefly examines the international, national, and non-governmental policies, legislation, initiatives, programmes and strategies that support UPE development in Uganda.

2.2.1.4.1 Teacher Development Management System (TDMS)

With an intention of improving quality and equity in the dissemination of education, and as a form of retaliation opposed to the increase in primary enrolment figures after the implementation of UPE, the Teacher Development Management System (TDMS) was launched in 1994 as a project of USAID (Ward, Penny & Read 2006: 75). TDMS was launched as a sub-component of Primary Education Teacher Development (PERP) designed to re-establish teaching as a respected profession, create a delivery report and support system through restructuring and rationalizing teacher training services, encourage community participation and establish a sustainable system of allocating resources (Ward *et al.* 2006: 76; Nansamba & Nakayenga 2003: 2). It was designed as a national support system to enable the rapid and effective introduction of new instructional materials; methods and curriculum assessment techniques; increase access to quality learning opportunities; Improve school management and instructional quality through (Nansamba & Nakayenga 2003 :6) :

- a) management training for all levels of education managers in order to reinforce management capacity of education institutions;
- b) revising and improving of the primary teacher education diploma, teacher education syllabi and production of related instructional modules to improve quality of teachers
- c) provision of in-service training and refresher courses for untrained and under-trained teachers

- d) equipping primary teacher's colleges and co-ordinating centre's and selected primary schools to enable them strengthen the pedagogical aspects of primary education; and
- e) community mobilisation as a way to create awareness of the importance of Primary Education.

Since the inception, TDMS has been launched in 6 phases in 23 Core Primary Teacher Colleges linked to 539 co-ordinating centre's representing 95,000 government aided Primary schools in Uganda offering a certificate in management skills in primary education for Head teachers (Ward *et al.* 2006: 76). This has made TDMS crucial in the management of UPE at school level and a way forward for an appropriate management framework through which UPE can be implemented successfully, based on the argument that part of training is critical for stakeholders understanding of individual roles and responsibilities towards implementation of UPE.

2.2.1.4.2 Primary school curriculum

Based on the June 2004 review that concluded that poor performance in all curriculum subjects is attributed to pupils' failures to develop early literacy (Ward *et al.* 2006:42), the Ministry initiated reforms in 2005 that resulted into the introduction of a new thematic curriculum in 2007 divided into three cycles each having an independent structure of knowledge, skills and learning outcome based on levels expected at the end of the day from pupils from different grades. Content and skills are taught arranged around a number of different themes rather than subjects in lower primary (IOB 2008:43).

Cycle one known as basic skills with a thematic approach, was designed to appeal to pupils in grades one to three, reflecting everyday interests and activities in line with the

Ministry's educational aims and objectives. In this cycle, subjects apart from English are to be conducted and assessed in the pupils' respective local languages (mother tongue) with an aim of enabling child growth, maturity and preparation for upper primary education whilst developing appropriate English skills (Ward *et al.* 2006:42-44).

Referred to as the transition year, cycle two was developed to apply to grade four pupils. In this cycle given the pupils transition from lower primary education to upper primary education, the Ministry contemplated that it was best to also change the medium of instruction and examining to the English language in order for pupils to attain both oral and written English skills at the same time enabling the transfer of all knowledge and skills acquired in a theme-based curriculum to a subject based framework (Ward *et al.* 2006:42-44).

Cycle three known as a subject based framework, and the last part of the curriculum was initiated to apply to pupils in grades five, six and seven with the concepts, knowledge and skills arranged in subjects such as Mathematics, English, Science, and Social Studies, all conducted and assessed in English to benefit students as they transcend to secondary level (Ward *et al.* 2006:42-44).

Based on the nature of the new curriculum, and its major implications for the delivery of education quality; teacher training requirements; monitoring and evaluation; examination and assessment; financial requirements; and learning materials profiles, lack of detailed planning and organising within the Ministry can lead to serious implementation problems of the curriculum hence impacting on UPE as whole. Therefore although government had put forward the curriculum as guideline on which classes are to be conducted, without proper planning and consultation from all the stakeholders, the success to the curriculum is bound to be interrupted.

2.2.1.4.3 Comprehensive programme to improve quality in primary education

Quality seen as a key indicator of education and given the Ministry's experience over the years in relation to the quality of primary education irrespective of the large sums of investments injected in primary education sector, the sector still produces low learning outcomes justified by the low levels of pupil's performance in numeracy and literacy levels (Ministry of Education and Sports 2005b:25). As a means to overcome the problem of quality in UPE, the Ministry initiated a comprehensive programme based on principles of quality, access, efficiency and sustainability in order to enhance quality and overcome low learning achievements. This was focusing mainly on school level, to improve the teaching and learning environment, with the attention on literacy, numeracy, and basic life skills in underperforming districts namely: Amaru, Oyam, Bududa, Bukedea, Lyantonde, Mebende, Kyenjojo, Bulisa, Nakapiripit, and Kabong (Ministry of Education and Sports 2008:4).

However, although the programme proved relevant to all districts, government's failure to raise the required 1, 13 456 billion Uganda shillings to implement the programme, resulted into the implementation of the programme in two phases focusing on the districts level of performance and the finances available is discussed below.

The first phase, representing under-performing districts, according to Ministry of Education and Sports (2008d: 5) implementation was divided into four different pillars namely:

- a) The pupil: focusing on the provision of qualified teachers to reduce constraints within and between schools; instructional materials to facilitate the government's wish of ensuring the children learn and develop the required knowledge in literacy

and numeracy; monitoring students' performance through attendance; and provision of classrooms.

- b) The teacher: emphasising the improvement of teachers' living standards through the provision of accommodation, implementation of a scheme service to upgrade the school levels of supervision and motivation, updating teacher knowledge and improving the teacher pupil ratio in lower primary in order to yield higher rates of literacy and numeracy.
- c) Management: increasing support supervision to avoid high rates of absenteeism while ensuring accountability to stakeholders, and the introduction of a non monetary reward system while enforcing customised performance targets.
- d) The community: evolving around the implementation of minimum school going age to limit under aged children from attending school, dissemination of information to the community to create awareness and encourage parents' participation in the assessment of school performance (Ministry of Education and Sports 2008d:11).

While the second phase that was basically based on the availability of funds was implemented countrywide following the same pattern of the pupil, teacher, management and the community, but depending on the budget and focusing on placing books in the hands of children, improving teacher's attitudes, ensuring head teacher attendance in schools and strengthening of school management committees (Ministry of Education and Sports 2008d: 18)

From the above, it can be deducted that the comprehensive programme to improve quality in primary education complies with some of the government initiatives to promote UPE. The programmes pillars promote provision of instructional materials, monitoring performance, ensuring school level supervision and motivation, training, ensuring accountability and emphasising the role of the community thereof, as well as encouraging

stakeholders' ownership to their roles and responsibilities. Therefore for the successful implementation of UPE in an appropriate management framework focusing on planning and organising to prevail, the Ministry has to strongly embark on this initiative as may be the solution to solving motivation, coordination and communication challenges faced during the management of UPE.

2.2.1.4.4 Initiative for instructional materials

Instructional materials are essential for teaching and learning as they increase teacher morale and also assist in the maintaining of pupils' interests. As a means of ensuring availability of feasible instructional materials, the Ministry introduced an independent body known as the Instructional Materials Unit (IMU), with the responsibility of dealing with the co-ordination and processing of instructional materials, planning for consolidation, storage and distribution of instructional materials from the national level to districts, monitoring and evaluating how instructional materials are utilised countrywide in schools and lastly inform schools on how to handle instructional materials (Nishimura & Ogawa 2009:120).

Lockeheed and Verspoor (1991:47) state that instructional materials are critical to successful learning and the intended curriculum cannot be easily implemented without them. Basing on this argument it is clear that an appropriate management framework focusing on planning and organising is vital for the success of the Instructional Materials Unit as it will ensure the efficient and effective distribution of the instructional materials, highlight the gaps in the management of these materials and also ensure that schools that urgently need these materials are reached first. Thus, reducing on the money spent on procurement of learning materials in schools in the end reducing the financial strain faced by these schools.

2.2.1.4.5 Initiatives to improve education in outreach areas

Irrespective of the large enrolment numbers in primary schools after the inception of UPE, not all children in Uganda have access to education, especially those in non formal settings. Given that one of the objectives of UPE is to provide access to primary education for all, the Ministry embarked on forming initiatives to fulfill this objective using alternative means to reach all children in Uganda such as (Byamugisha & Nishimura 2009:123).

Alternative Basic Education for Karamoja (ABEK) which entails the stretch UPE in the pastoral semi-nomadic communities of Karamoja situated in the Northeast of Uganda made up of Kotido, Moroto and Nakapiripit targeting children ranging from 6-18. The ministry initiated ABEK programme in 1997 as complementary basic education represented in national education policy, planned as means to an end for barriers to basic education faced by semi-nomadic pastoralists focusing on giving beneficial knowledge, mobilisation and capacity building within and outside the community to support UPE in the region (Chemilo 2009:20).

Basic Education for Urban Poverty Areas (BEUPA), whose scope includes targeting primary school dropouts, the poor without an opportunity to access primary education but of school going age in urban areas. The programme offers a three year course requiring high participation in basic education and vocational skills to disadvantaged children who are financially unsuitable, so far benefiting 5000 pupils (Byamugisha & Nishimura 2009: 123).

Complementary Opportunities to Primary Education (COPE), which includes pupils that have never attended school or who enrolled but quit before attaining basic skills and literacy parallel to the above mentioned initiatives. It is a three year programme

comprising of four primary subjects where pupils study for only 3hrs per day. It targets disadvantaged pupils in the districts of Arua, Bushenyi, Kamuli, Kisoro, Masaka, Mbarara, Mubende, Nebbi, Sembabule and Kalangala aiming at spreading the importance of learning in these districts (IOB 2008:41).

As a result, the programmes have tremendously tried to fulfill the UPE objectives to make basic education equitable in order to eliminate disparities and inequalities. And the immediate result of the programmes has been an increase in the number of enrolments creating a need for more teachers, instructional materials, classroom space and other school supplies. This has heightened the importance of the planning and organising functions within the Ministry of education and sports for the successful implementation of the programmes.

2.2.1.4.6 Financial initiative for Universal Primary Education

The launch of UPE in Uganda resulted in a need for classrooms, textbooks, desks latrines, teachers and running water for primary schools to operate smoothly in order to cope with the increase in number of pupils. As a result, the government came up with School Facilities Grant (SFG) to assist needy schools in construction of classrooms and finishing those that were built as result of UPE replacing the centralized system that was undertaken by the World Bank involving different mediators and mechanisms (Ward *et al.* 2006:115).

For SFG to be attained, schools have to first be informed by the local government, and then apply for the grant where schools are ranked based on their needs, from which district officials visit these schools to approve. After the approval, the qualifying schools open up SFG bank accounts, sign contracts and letters of agreement with district officials,

and then construction begins under the supervision from the community and schools (Ward *et al.* 2006:119).

As the sole mandatory for constructing school facilities in the country funded by the government, according to Ward *et al.* (2006:118) the availability of SFG has transformed the landscape of Uganda with almost every parish receiving at least two classrooms, supported by its budgeting and planning phase running from November to June every year along with its main activities such as: resource ceilings communication by the central government; field appraisal and preparation review; and approval of the SFG annual work budget plan. Relating to the problem statement showing that for the programme to be more effective, an appropriate management framework focusing on planning and organising is required within the Ministry to ensure effective and efficient distribution of the funds to schools, ensure accountability and transparency, overcome delays in disbursement of the funds to schools and ensure that SFG is given to school where it is needed the most.

2.2.1.4.7 Early Childhood Development (ECD) and Universal Primary Education

The Ministry of Education and Sports (2007d: 2) states that “early childhood development is a process through which young children grow and thrive physically, mentally, socially emotionally and morally.” Learning begins at birth and whatever a child experiences at this stage will have an implication on the child’s learning in the latter years (Ministry of Education and Sports 2007d: i; Burke-Ramsay and Degazon-Johnson 2005:5). Based on the argument, the Ministry initiated a multi- sectoral Early Childhood Development (ECD) policy to advocate for an expansion in policy framework where ownership, management and execution of early childhood development programmes are communicated and harmonized within the country. The aim was to give children a firm foundation upon which later experiences should be based; reduce repetition rates in school; promote active learning and recognition of children’s rights irrespective of gender sex and disability; and

encourage active and participatory learning while promoting natural development in children (Ministry of Education and Sports 2007d: i, 3).

From the above it is clear that ECD forms the basis, from which pupils transcend to primary level, reduces incidences of repetition, enrolment, and drop out of under aged children in primary level. And if successfully implemented, ECD will lead to a reduction in the wastage of UPE funds. Therefore, in order to ensure the successful implementation of UPE, the ministry should adopt an appropriate management framework focusing on planning and organising that adequately caters for ECD.

2.2.1.4.8 Initiative in support of girl child

Bridging the gap between male and female children of school going age is important in education as it is the way forward towards achieving gender equity in education and empowering women. To promote gender in education in primary schools, the Ministry of Education and Sports put in place numerous initiatives which are discussed below.

The Girls Education Movement (GEM) is also an Africa-wide popular approach initiated in 2001 to promote quality education for girls with an emphasis on: enrolment for girls; giving a helping hand to girls with special needs; and having the community rally behind girl child education (Nishimura & Ogawa 2009:124). In addition, the ministry also developed the Gender in Education Policy in, 2008 to (Ministry of Education and Sports 2008c: 12):

- a) “ensure fair and profitable involvement for ALL in the education system;
- b) ensure an education system that provides applicable knowledge and skills evenly to males and females; and

- c) ensure an education system that is gender responsive and provides a protective environment for all persons”.

From the list above it can be deducted that the government initiative in support of girl child conforms to the ministry of Education and Sports vision of providing education for all irrespective of the gender so as to abolish any form of discrimination in education. Therefore given that the Ministry is accountable for promoting fair and profitable participation of all individuals, providing an education system that is gender responsive as well as overcoming issues pertaining to discrimination, gender inequality presents an obstacle to the achievement of UPE. Therefore to overcome this issue, the Ministry has to adopt an appropriate management framework focusing on planning and organising that adequately caters for gender in education in order to ensure the successful implementation of UPE.

2.2.1.4.9 Poverty Eradication Action Plan (PEAP 2004-2008)

This is Uganda’s guide for planning how to eradicate poverty. According to PEAP 2004-2008,

“education has good economic returns especially primary education and investment in education contributes to the accumulation of human capital which is essential for high income and sustained economic growth.”

PEAP recognises the importance of UPE under its fifth pillar on human development stating that the quality and efficiency of UPE can be attained through improving teacher quality, use of mother tongue as medium of communication, adjusting assessment and examination to match changing needs in society, multi-grade teaching, double shift and providing incentives to teachers in remote areas (PEAP 2004-2008:156). Based on the

above argument, a deduction can be made that for the successful implementation of UPE to prevail within an appropriate management framework focusing on planning and organising, it is very important that the Ministry of Education and Sports strongly recognises the contributions of the Poverty Eradication Action Plan towards UPE, due to the fact that some of these contributions are mainly solutions to the planning obstructing the success of UPE.

2.2.1.4.10 Education Sector Strategic Plan 2004/2015

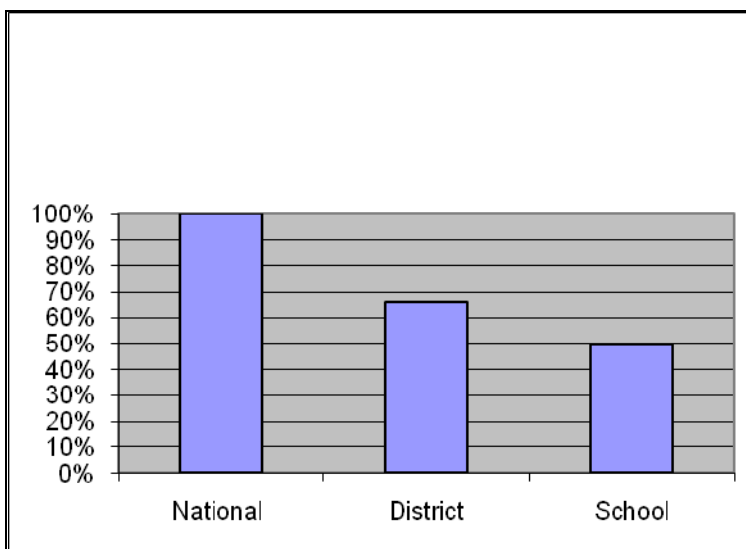
This Plan was adopted by the government in 2004 replacing the Education Sector Investment Plan of 1998-2003. The Education Sector Investment Plan objectives were (Byamugisha & Ssenabulya 2005:8), achieving equitable access to education at all levels; improving quality of education particularly at the primary level; enhancing the management of education service delivery at all levels; and developing the capacity of Ministry of education to plan, programme and manage an investment portfolio that will effectively develop the education sector.

Although the Education Sector Investment Plan was replaced by the Education Strategic Sector Plan (ESSP), emphasis is still on the implementation of UPE and assists the Ministry to fulfill its mission *“to support, guide, coordinate, regulate and promote quality education and sports to all persons in Uganda for national integration, individual and national development”* (Bitamazire 2005:2). The objectives of ESSP are (Ministry of Education and Sports 2005a:16):

- a) to build an education system that is significant to Ugandan’s national development;
- b) to ensure that all children realise education goals at primary level; and
- c) to maintain an effective and efficient education sector.

For the successful implementation of UPE, based on the arguments above it is recognised that the government has tried to come up with various initiatives to enable UPE. However, the question still stands on how relevant these initiatives have been to the implementation of UPE and the knowledge and understanding of these initiatives by the various stakeholders. As a result, stakeholders were tested on their knowledge and understanding of the government initiatives enabling UPE and figure 2.2 is an indication of the results.

Figure 2.2: Question: Are you aware of the plans, strategies, programmes and policies enabling UPE?



In all instances, 100% of the stakeholders at national level that were interviewed noted that they were aware and had an excellent understanding of all the government initiatives enabling UPE. Sixty six percent (66%) at the district level also declared that they were aware of all the initiatives and had a good understanding while at school level only 50% said they were aware and had a good understanding of all the initiatives.

From the above, it could be argued that even though majority of the stakeholders at national level have excellent knowledge and understanding of the initiatives enabling UPE, they lack implementation capacity. The highest percentage of stakeholders at school level where these policies are implemented lack the in-depth understanding of these initiatives clearly indicating that even though initiatives enabling UPE have been put in place, they have not been communicated, documented and implementation has not been adequately emphasised at all levels. From the above arguments, it could be concluded that legislation guiding the implementation of UPE is sufficient but also challenging in terms of implementation. Therefore for an appropriate management framework focusing on planning and organising to prevail, stakeholders should not only be aware of the initiatives but also have an in-depth understanding of these initiatives in order to reap possible benefits intended when these initiatives were designed.

The political environment provides a framework within which an institution operates and comprises the legislative framework enabling the implementation of UPE. However, given the fact that the political environment within which UPE is implemented is shaped by a unique combination of forces i.e. the various stakeholders involved and the specific laws, policies, initiatives and programmes enabling UPE, it is imperative for the Ministry of Education and Sports to strongly acknowledge the influence of the political environment. This is mainly because it is through the political environment that parameters determining what should be done, who should do what and how it should be done is depicted.

2.2.2 Socio-economic environment

The socio-economic environment is a combination of social and economic factors influencing the management planning and organising of UPE in Uganda. Issues to be discussed in this environment include population trends, poverty, HIV/AIDS and conflict.

2.2.2.1 Poverty

The World Bank (2000:34) states that poverty is a result of lack of income and assets to attain basic needs, power and a voice to influence the society as well as a vulnerability to adverse shocks linked to the inability to cope with them. Since the NRM came into power in 1986, Uganda has grown from a nearly failed state characterised by civil strife, lack of respect for human rights, unemployment and extreme poverty, to a country with high economic growth rates as a result of strong macroeconomic management and savings.

Prior to 1986, infrastructure had been destroyed and about 56% of the population was living below the poverty line with little or no access to basic services. The NRM-led government initiated policies and strategies to promote economic liberalisation, private sector based and export led economic growth. The following are example of policies and strategies which supported in the eradication of poverty (Uganda Joint Assistance Strategy 2005:2)

- a) liberalisation and decentralisation of the education sector in 1992 through the decentralisation policy with an aim to transfer authority to districts, free local managers from central constraints and improve financial accountability;
- b) universalisation of primary education through the UPE Programme with an aim to promote free education to all children of school going age in Uganda Primary Education;
- c) selling of government-owned enterprises through the privatisation policy with an aim to increase government finance and create employment; and
- d) the introduction of the Poverty Reduction Action Plan in 2001 to reduce the number of citizens living below the poverty line.

A clear indication of how poverty impacts on education and a call for a proper management framework focusing on planning and organising for the successful implementation of UPE in Uganda.

These policies backed the government to maintain microeconomic strength while directing large shares of public spending to investment, human progress and improving public services with a goal of targeting the poor. As a result the government was able to maintain inflation rates below 5%, increase gross domestic savings from 4.7% in 1999/2000 to 8.6% in 2003/2004, and exports from 11.2% of Gross Domestic Product (GDP) to 13.7% in the same period. While at the same time progress in its foreign direct investment rose from \$133 million in 2000/2001 to \$202 million in 2003/2004 (Uganda joint Assistance Strategy 2005: 2-3; Ministry of Education and Sports 2003:1; Yan, Obeng-Odoom, Munk, Buckarie & Ugochukwu 2007: 2).

Irrespective of the above, Uganda is still ranked among the poorest countries in the world. According to the United Nations Development Programme's Human Development Index (2008:1), Uganda ranks 154 out of 177 countries. Income inequality measured by the Gin coefficient stands at 0.43% and 37.7%, 41.1% and 12.2% citizens are living below poverty line in national, rural and urban areas respectively (PEAP 2004-2008:12).

The relationship between poverty and UPE according to Yan *et al.* (2007:2) can be assessed based on a sustainable livelihood framework. Yan *et al.* (2007:5) states that exposure to education increases human capital development through the acquisition of skills, knowledge and ability to labour. Furthermore, it assists in enabling the poor to make better use of their possessions. While UPE means that families do not have to pay school fees, uniforms and school materials do need to be purchased and with wide spread of poverty in the county, UPE is bound to lead to an increase in dropout rates due

to the fact that some parents cannot afford to pay for other expenses involved in schooling. Therefore for UPE to be successfully implemented by the Ministry there is a need for proper management framework that recognises the impact of poverty on education in its planning and organising functioning, so as to overcome problems like dropout rates as result of poverty.

2.2.2.2 Population changes

Population refers to the number of people in a geographic area determined by fertility rates, mortality rates and life expectancy. With an area of 241,038 square kilometers, Uganda has one of the highest population growth rates in the world at 2.69%. The fertility rate is at its greatest at 6.77, which places Uganda third in world after Niger and Mali (Index Mundi 2009a:1; Index Mundi 2009b:1). Population and education are two inseparable concepts and for education to succeed population trends cannot be ignored. Population impacts on education in a number of ways starting from enrolment levels, budget and finance considerations to infrastructure development (UNESCO 2000b:1). Therefore for the successful implementation of UPE, an appropriate management framework focusing on the planning and organising function within the Ministry needs to be given consideration in order to overcome population related challenges.

Education plays a key role in addressing social and economic barriers within a society and is central to realizing economic growth strategies. As observed, through different variables such as lower fertility rates, lower maternal mortality rates, decreased infant mortality and greater life expectancy, in one way or another impact on the population dynamics of a country and latter the implementation of policies such as UPE (UNESCO 2000b:1; PEAP 2004-2008: xxii).

Bella & Belkachla (2009:1) have examined the relationship between education and population and have come to a conclusion that there is a two way relationship between the two. Thus, population impacts on education and, similarly, education also affects population levels implying that population growth will either facilitate or hinder efforts to achieve UPE, especially when it is rapid and placed within a context of resource constraints. Referring to the literature from the United Nations (2003: 1) as well as Bella & Belkachla (2009:1); PEAP (2004-2008:173) and Uganda Joint Assistance Strategy (2005: 5), exposure to education is strongly related to a broad range of demographic behaviours such as a reduction in levels of fertility, determining the desired family size, increased family planning, decreased mortality and migration. For example, exposure to education increases the age at which individuals get married as well as the value system and beliefs of women towards marriage (Bella & Belkachla 2009:1). Educated women are believed to get married at a later stage, more determined to find jobs and are aware of the responsibilities to raise children (Bella & Belkachla 2009:1).

Therefore given that an increase in population will lead to an increase in enrolment which will later lead to an increase in demand for classroom space, instructional materials, teachers, textbooks and a potential to put a great damage on a country's ability to pay for learners and delivery of educational infrastructure, an increase in population cannot be ignored if UPE is to succeed. It is therefore important to note that for education planning to succeed, demographic trends need to be taken into consideration justifying the statement that the rapidity and changes of population growth are determined by birth rates which without a doubt impact on the future education planning process (Jones 1975:71; Bella & Belkachla 2009:1).

2.2.2.3 Conflict

Conflict can be defined as antagonism between opposing forces, reflecting a range of opinions, preferences, needs or interests (Heywood 2007: 447). Although known as the

pearl of Africa, Uganda is no different from all the other African countries. The country has experienced a series of wars both before and after independence. However the worst and ongoing conflicts to date are between the Lord's Resistance Army (LRA) and the National Resistance Movement (NRM) government, and Karamajong pastoralists and the neighbouring districts in the eastern parts of Uganda (Nanyonjo 2005: 473). The result of the conflict has been the gross violations of human rights, paralysing economic development, leading to the breakdown of culture and society and the destruction of infrastructure such as schools, which all impact on the management of UPE (PEAP 2004-2008:100 & Higgins 2009:1).

According to the UNICEF (2007:1) more than 1.3 million people have been displaced in the North of Uganda, among which 80% are women and children. Conflicted regions in Uganda remain the poorest in the country with an average of 63% of individuals surviving on one dollar a day. As a result of continuous chaos, education has suffered a great deal. Schools have been forced to close down, reduce teaching hours and teachers are compelled to find safer teaching environments (Kitgum District 2005:38). In the Kitgum District, 86% of the schools were displaced and forced to re-establish themselves as part of other schools resulting into overcrowded classrooms, inadequate infrastructure and poor performance of pupils (Kitgum District 2005:38). As result, conflicts generate a threat to the implementation of UPE, and thus creating the need for an appropriate management framework focusing on planning and organising within the Ministry if UPE is to exist along with conflict.

Yinusa & Basil (2008:320) state that "conducive learning environments stimulate learning, understanding, performance and high perception of students while dilapidating buildings characterised by low seating arrangements are destructive to education performance, understanding and concentration in class". This argument is characteristic of the northern parts of Uganda. UPE statistics compiled show that the number of primary pupils

repeating a grade from 1996 to 2006 increased sharply from 56,328 scholars (33,308 males and 23,020 females) to 159,898 scholars (82,380 males and 77,518 females). The region also has the highest teacher to pupil ratio standing at 151:1 with a 41% failure rate in primary leaving examinations (Education Planning Department 2008: ix; Nanyonjo 2005:480).

Compared to the situation in other regions not affected by the war in terms of children's performance, school attendance and the availability of teachers willingness to teach, the situation in Karamoja still needs serious attention. Thus the Ministry of Education and Sports is still challenged with the task of management through proper planning for the region in order to successfully implement UPE.

2.2.2.4 HIV/AIDS and Universal Primary Education

The Human Immune-Deficiency Virus (HIV) and the Acquired Immune-Deficiency Syndrome (AIDS) have major implications for education in Uganda. HIV belongs to a class of slow viruses manifesting itself in the slow progression and ready transmission of the disease leading to weakening and subsequent breakdown of the body (Kelly 2000: 17). Based on the statistics, in 2000, 70% of people living with HIV were located on the African continent while 72% of the new infections took place in the region (Coetzee 2001: 5 in Van Dijk 2003: 101). Like other African countries, HIV/AIDS is no stranger to Uganda. The virus has affected the most productive age group, between 15 and 49, with the most common mode of transmission being heterosexual transmission accounting for about 84% of cases. Other modes of transmission over the years have included mother-to-child transmission, sharing of un-sterilised sharp instruments, circumcision, widow cleansing and inheritance all resulting from ignorance and a lack of basic education (Kakuru 2008:37; Kelly 2000:26).

The fact that education is associated with individuals, it is always threatened by any infectious diseases or illness implying that the impact of HIV/AIDS challenges the education process at all levels starting from the planners down to the students in class. (USAID 2000:1; Kelly 2000:42). Coleman (2003:3) states that the *“rising incidence of the epidemic is eroding the gains made in education by threatening future opportunities for schooling, and death of parents leading to children heading homes with little hope of schooling”*. Strickland (2000:1) states that HIV/AIDS increases infant mortality, increases the number of orphans without support, increases teacher absenteeism and attrition while disseminating the ranks of planners, technical managers, curriculum designers and information specialists. On the other hand Kelly (2000:45), states that the impact of HIV/AIDS on education can be analysed in terms of demand, supply and quality in ten different ways which are:

- a) the demand for education;
- b) the potential clientele for education;
- c) the supply of education;
- d) content of education;
- e) process of education;
- f) institution of schools;
- g) availability of funds for education; and
- h) agency participation in education and planning and management of the education system (donor funding).

Having looked at the above arguments, the planning and organising of UPE should take into consideration how to deal with HIV/AIDS related matters in order to succeed due to the fact that not only does HIV constrain the potential clientele for education, the demand

for education and supply for education, it also hampers the availability of funds for education.

Uganda has been is among the African countries that have experienced both high levels of HIV/AIDS and conflict in the same period. As a result, two million children have been left orphaned and 59.1% are estimated to become orphans by the year 2010 (Kelly 2000:58). The cost of HIV to education globally is estimated to be \$1 billion per year as a result of teacher death and absenteeism (National Academy of Public Administration 2006:3). In Uganda out of the two million orphans in the country, 85% in 2006 were believed to attend primary school only because it is free (Ministry of Education and sports 2006:10). This creates a scenario that impacts on the quality of education in numerous ways given that orphaned pupils tend to lack scholastic materials, are frequently ill and have no parental care.

A teacher is central in all education systems and without them there would be no education at all (UNAIDS Inter- Agency Task Team 2000:1). An infected teacher loses about six months of professional working time before developing AIDS and a period of one year may go by before he/she is completely bed-ridden (Kelly 2000:58). The situation creates a gap between the demand for education and the supply of education portrayed in the shortage on skills transfer from teacher to teacher as result of attrition emanating from death, self stigma and discrimination (Ministry Of Education and Sports 2006:12).

According to Carr-Hill & Peart (2009:10), there is little information available to assess the impact of HIV/AIDS on teachers making it even impossible to estimate the salary paid to the sick or inactive teachers. The permanent or temporary absenteeism of one teacher can have repercussions on over 100 pupils, as well as the picture painted by the statistics. The effect of the epidemic is still appalling and creates a big challenge to the

management of UPE. Therefore, for UPE to be successful and prevail alongside the HIV/AIDS pandemic, proper management framework where HIV is clearly depicted needs to be considered in the education planning system.

Challenges of the social economic environment are enormous and should be handled with a great deal of compassion and understanding. From the arguments stated in this section above, it is clear that factors such as HIV/AIDS, poverty, and conflict and population changes within the social environment often have a profound influence on the implementation and management of UPE in one way or another. For example with high levels of poverty families are unable to afford scholastic materials or even pay for the extra expenses involved with schooling. Schools are disrupted in the case of conflict while the demand and supply of education is constrained by the vast spread of HIV/AIDS. As a result, it is imperative for the Ministry of Education and Sports to take into consideration the social economic environment to ensure the successful implementation of UPE.

2.2.3 Technological environment

The technological environment refers to the state of science and technology within a specific environment (Du Toit & Van der Waldt 1997:117). Changes in technology influence the functioning of government ministries. This implies that for public servants to perform their duties to their full capacity, they should always be aware of the changes in technology. Information and communication technology (ICT) is the electronic means of capturing, storing, communicating, manufacturing and assembling information while motivating learners, providing opportunities for students through acquisition of both skills needed in the digital environment and day-to-day activities such as research (Republic of Uganda (2003:18); Kenny & Grace (2003:629).

For governments to make digital technology work in their ministries, according to Gates & Hemingway (1999:256), they should: provide access to electronic mail and eliminate paper filling; download government online with an interface designed for users; encourage electronic commerce; deregulate telecommunications infrastructure; and enhance the skills of citizens by using technology as part of education and training courses at all levels.

Uganda initiated a national ICT policy in 2003 with the objectives to sensitise and create awareness of the use of ICT, address literacy improvements and human resource capacity-building (Republic of Uganda 2003: 10). In 2005, to support ICT in education, the Ministry of Education and Sports drafted the ICT Policy in Education with a mission to provide equitable access to quality education and timely accurate information using information and technology (Ministry of Education and Sports 2005c:14).

According to the Ministry of Education and Sports (2005c: 10), the fundamentals underlying the transformation from information society to knowledge-based society features the investment of ICT in education, starting from primary level to tertiary level. The vision is to *“create a country where good governance and human resource development are sustainably enhanced, promoted and accelerated by efficient and timely access to information through use of ICT”* (Ministry of Education and Sports 2005c: 5). To promote ICT in education at all levels a number of initiatives have been developed and, according to Ministry of Education and Sports (2009b), these include:

- a) **“Education Management Information Systems (EMIS)** responsible for collecting and compiling data, providing statistics and scholars details country wide.
- b) **School net Uganda** is a network of professional educators with the aim of transforming the education system from an industrial model to a knowledge-based

model. Pupils will be able—to effectively enter a global economy based on knowledge, information and technology.

- c) **Connectivity for Educator development (Connect-Ed)** developed with the support of (USAID) in close cooperation with the Ministry of Education and Sports. Connect-ED was initiated in 2000 in order to address the need for quality primary education and the provision of additional resources for Ugandan primary teachers. Connect-ED is using technology to enable and enhance learning and teaching for primary educators through the creation of multifaceted approaches to integrating media and computers in the Primary Teacher Colleges (PTC) classrooms. Currently the programme exists in eight Core PTC's namely; Mukuju PTC, Gulu PTC, Bushenyi PTC, Ndegeya PTC, Kibuli PTC, and Soroti PTC.
- d) **Institute for Information and Communication Development (IICD)** working in conjunction with the Ministry of Education and Sports to amalgamate ICT into mainstream education curriculum to provide impartial access for all students in spite of the educational level. The IICD currently has 4 projects running namely; ICT based educational content, ICT training, ICT Workflow Management and Financial Information, ICT Maintenance Capacity.
- e) **Global Teenager Programme** aimed at assisting scholars to learn and use ICT in Secondary Schools.
- f) **Curriculum Net** established with the intention to test the technical and operational feasibility, and economic viability of ICTs in the education delivery process. The ultimate goal of this project is to accelerate the participation of schools, teachers and learners in the use of ICT in the teaching and learning process. The project supports all teachers, and scholars who foster the use of ICT in the teaching and learning process.
- g) **U-Connect** established with the goal to introduce more widespread use of ICTs in the Ugandan primary and secondary schools, especially in rural towns. The project

raises awareness of the benefits of ICT-enhanced primary and secondary school education, especially the ability to dramatically amplify the limited educational resources in rural towns, and demonstrate best practices in the economic provision of school computer labs and affordable high bandwidth connection to the Internet in a developing country”.

Irrespective of the above initiatives, many primary schools still lack access to computers and those that have computers still lack the resources like electricity, connectivity and teachers to guide them in the use of computers. According to Farrell (2007:8), only 106 out of 13,353 primary schools were connected to the Internet in 2003 and with the emergence of an electronic global environment, ICT will be a necessary prerequisite for pupils to participate in society. Therefore influence of the technological environment on UPE needs to be efficiently and effectively planned for if UPE in Uganda is to be a success on the global environment. This can be done through using technology as part of education and training at all level of education, management and between all departments of education.

2.3 INTERNAL ENVIRONMENT

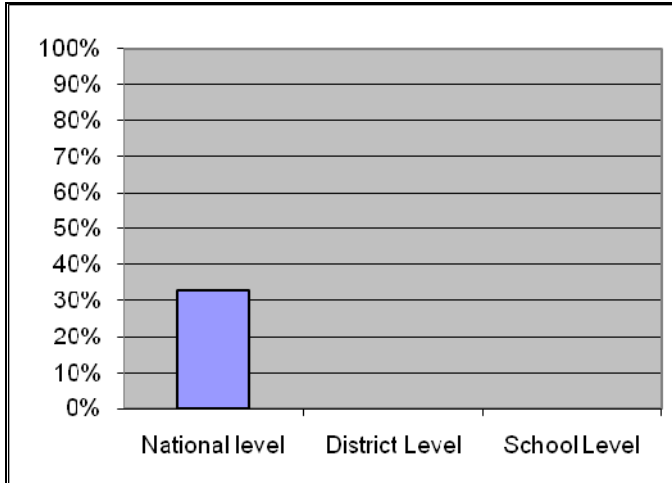
The Internal environment comprises factors within the institution defined as a set of measurable properties of the work environment ranging from employees’ attitudes to motivation directly or indirectly impacting on the institution’s performance. A skilled teacher with a negative attitude towards UPE and no motivation whatsoever may lead to poor performance, attrition, and absenteeism thus impacting on the implementation of UPE. Therefore in order to ensure the successful implementation of UPE, all factors contributing to the internal environment of UPE need to be addressed.

2.3.1 Motivation

Motivation is a central product everyone needs on a daily basis to function effectively and resourcefully to attain one's goals (Harvey 1998:8). Whitely (2002:6) states that motivation is exclusive and exists in the unlikeliest places, absent in the most promising locations, cannot be measured or easily seen, causes the most monumental and unskilled human achievements to be consumed, binds people together and its absence leads to dissatisfaction, mutiny and revolution. Gellermann (1992:3) states that motivation is the art of helping people to focus their minds and energies on doing their work as effectively and efficiently as possible. Motivation is the fuel for performance and without it the negative returns of performance became evident (Green 2000:4). Motivation is the process that accounts for individual's intensity and persistence of effort towards attaining a goal (Robbins 2003:170); initiation, intensity and persistence of behaviour (Green 1995:2) and motivation is willingness to do something conditioned by the ability to fulfill a want (Robbins 2003:43).

Given the decentralised nature of UPE, for proper implementation through an appropriate management framework focusing on planning and organising, the ministry of Education and Sports would need to emphasise motivation as it is a major contributing factor to the internal environment of the Ministry. Specific questions have been asked to assess the Ministry of Education and Sports attempts towards motivating stakeholders and mechanisms used. Figure 2.3 deals with the question how would you describe the Ministry of Education and Sports attempts toward motivating you as stakeholders in the implementation of UPE? How effective is the Motivation? And what are the motivation mechanisms that have been used?

Figure 2.3: Ministry of Education and Sports attempts towards motivating stakeholders in the implementation of UPE



Thirty three percent (33%) of the stakeholders at national level said that there was government attempt towards motivating stakeholders while at both district and school level all the individuals interviewed said there was no government attempt towards motivation whatsoever. As a matter of fact one of the individuals interviewed said *“why should there be motivation for good performance, UPE is the stakeholder’s job that is why they are hired”*.

Based on the interpretation of the figures above, a deduction can be made that the Ministry of Education and Sports is unable to align motivation with stakeholder’s performance in the implementation of UPE. The lack of alignment is indicative of a lack of an appropriate management framework focusing on planning and organising for the implementation of UPE in the Ministry. This implies that despite the various initiatives in place to enable UPE, the Ministry still lacks a comprehensive motivation strategy towards the stakeholders.

Robbins (2003:43), states that motivation begins with a need which creates tension and later drives one to attain one's original goal. In order to support the importance of motivation, theories were developed in the 1950's which up to date can still be applied for one to understand the role played by motivation towards institution performance. Specific theories to be discussed include:

2.3.1.1 Hierarchy of needs theory

This was and still is the most familiar theory of motivation developed by Abraham Maslow in 1950 commonly known as the most original thinker on motivation. This theory identified that within every individual there exists a hierarchy of five needs represented on a pyramid from the highest to the lowest need. These needs include physiological needs such as hunger, thirst, shelter, sex and other bodily needs; social needs like affection, sense of belonging, acceptance and friendship; esteem needs comprising of both external and internal factors like self respect, autonomy and status and self-actualisation need represented at the peak of the pyramid. For further understanding of the theory Maslow separated the needs into lower needs covering physical and safety needs and upper needs comprising of social, esteem and self-actualisation and can be satisfied internally (Robbins 2003:43).

Based on the fact that the implementation UPE in general involves individuals, it is definite that these individuals have a vast array of needs i.e. social needs, psychological and personal needs all in one way or another influencing their performance. Therefore, for the successful implementation of UPE to prevail, it is of importance that the hierarchy of need theory is strongly emphasised within Ministry of Education and Sports.

2.3.1.2 Vroom's expectancy theory

Also known as the expectancy theory of motivation, Vroom argues that strength of a tendency to act in a certain way depends on strength of an expectation. Action will always be followed by a given outcome and attractiveness of that outcome. Three variables are included in this theory and cannot be left out which are attractiveness, also meaning the desire one places on the outcome after completion of the job; performance/reward variables meaning the level of performance needed to attain the goals and objectives and; effort variables detailing how much is needed by an individual to reach a certain goal (Robbins 2003:53).

Based on the findings represented on figure 2.3, it is clear that there is limited motivation for stakeholders participating in the implementation of UPE. Referring to the Vroom's theory, although motivation to engage in a task depends on how one believes they can accomplish what they attempt to; making such an assumption can lead to disaster in any institution (Robbins 2003:53). Therefore for the successful implementation of UPE to prevail, it should be the role of the Ministry of Education to encourage, motivate and plan carefully for employees so that they can believe in themselves so as to perform.

2.3.1.3 Two-factor theory

This theory also referred to as the motivation hygiene theory was proposed by a psychologist by the names of Herzberg in 1950. Herzberg believes that individual's relation to work is basic and one's attitude towards work can determine whether the outcome will be a success or a total failure. As a result Herzberg grouped factors that influence a person's attitude toward work into two categories namely; motivators and hygiene factors. In the category of motivators he identified promotional opportunity, recognition, responsibility and achievement. Hygiene factors which he also called factors that lead job dissatisfaction included quality supervision, wages, company pay policies, working conditions, relationships, job security and personal life (Robbins 2003: 46;

Whitely 2002:85). Attitude towards work plays a great role in the success on any institution, ministry or even primary school. Teacher's attitudes towards teaching cannot be taken for granted as they hold the key to success for pupils. Therefore for UPE to succeed and ensure that by 2015 all children of school-going age are not only enrolled but also able to complete primary school, the Ministry of Education and Sports has to apply the two-factor theory and strongly consider the hygiene factors (factors that lead to disgruntlement) while planning for UPE given the differences in the level of development in the various regions, the safety and geographical location of schools.

2.3.1.4 Equity theory

Slightly different from the other theories is the equity theory also grouped with contemporary theories of motivation. It states that the fact that employment does not take place in an enclosed environment means that employees will always compare themselves with others. Employees measure what they put into the institution against what they get out of (outcome) and then compare with the other employees. After the comparison and they are satisfied, equity is reached and justice is served. But when the opposite occurs employees view themselves as undermined, unappreciated and will always want to correct the situation. According to this theory, when dissatisfaction takes place employees may co-opt others to change their outcomes, distort their own input and even quit their jobs all in all leading to low performance rates (Robbins 2003:50-51).

Given the fact that the provision of primary education in Uganda involves both government aided schools and private school, with teachers receiving different salaries and benefits, comparison is bound to happen in one way or another amongst the teachers. Therefore for the successful implementation of UPE to prevail within an appropriate management framework focusing on planning and organising, it is very important that the equity theory is present within the Ministry of Education and Sports.

2.3.2 Attitude

The concept attitude has been defined more or less the same by different scholars. According to William (1982:52) attitude is a tendency to assess an object in a positive or negative way. Reitz (1977: 256) describes attitude as a persistent tendency to feel and behave in a particular way towards an object. Robbins (2005:78) refers to attitude as an evaluative statement which can be favourable or unfavourable concerning an object, people or events summed up as a reflection of one's feelings. Attitudes are made up of three components which are; *cognition* associated with people's beliefs, opinions and information a person has about an object, *affection* representing the emotional component of an attitude and then *behaviour* meaning the intention to act in a specific way (Robbins 2005:78; Reitz 1977: 257-258).

Attitudes are divided into job satisfaction, job involvement and institution commitment. Job satisfaction meaning a collection of feelings an individual has about their job, involvement referring to the rate to which a person identifies psychologically with their jobs and consider his or her performance as indicative of self-worth and institutional commitment referring to loyalty (Robbins, Odendaal & Roodt 2001:73)

Attitudes are not inherited but can be acquired through direct experience with an object; association and communication from others, therefore, playing a crucial role in the success of the institution as well as the performance of its employees. For the successful implementation on UPE in an appropriate management framework focusing in planning and institution to prevail, attitudes of public officials, teachers, parents, head-teachers, district officials, and national level representatives have to be taken into consideration. They are important phenomenon in the internal environment of the Ministry of Education and Sports and make a significant contribution to the quality of public administration and management.

Specific questions were asked to obtain an insight from stakeholders about their attitudes towards UPE, policies enabling UPE and perceptions towards UPE policy in general.

Figure 2.4 represents the question what is your perception towards the plans, strategies, programmes, and policies enabling UPE on the scale that indicates (1) positive, (2) negative and (3) mixed attitude?

Figure 2.4: Perceptions towards the plans, strategies, programmes and policies enabling UPE

Stakeholders	Positive attitude	Negative attitude	Mixed feelings
National level	67%	0%	33%
District level	25%	25%	50%
School level	0%	50%	50%

Based on the figure above, majority of the stakeholders (67%) at national level have a positive attitude towards the plans, strategies, programmes and policies enabling UPE with only 33% having mixed feelings towards UPE. Only 25% have a positive attitude and 50% with mixed attitudes towards these plans, strategies, programmes and policies enabling UPE at district level. While at school level, amongst those interviewed it is clear that majority 50% have both negative and mixed attitudes towards the plans, strategies, programmes and policies enabling UPE respectively. The fact that the largest number of stakeholders at national level has positive attitudes towards the government initiatives enabling UPE as opposed to the district and school level, is a clear indication that implementation of these initiatives is still challenging.

In addition to the above, stakeholders perceptions at all levels were also determined represented by (figure 2.5).

Figure 2.5: What is your perception towards UPE?

Perceptions towards UPE policy	National level	District level	School level
The policy is good but implementation stage was rushed and the interpretation of the policy is wrong	67%	75%	50%
The policy is good and well implemented	33%	0%	0%
The policy is politically influenced	0%	25%	50%

Based on the interpretation of respondents to the interview question represented by figure 2.5, the deduction can be made that the substantial number of stakeholders that is 67% at national level, 75% at district level and 50% as school level perceive UPE policy as good, but implementation stage was rushed and the interpretation of the policy is wrong. With some even saying that the policy is politically influenced represented 50% at school level and 25% at district level. Therefore given that none of the stakeholders interviewed at both district and school level perceive UPE policy as good and well implemented is indicative of the fact that stakeholders' perceptions towards UPE policy are still powerfully negative.

The aim of the interview was to assess the stakeholders' perceptions towards the plans, strategies, programmes, and policies enabling UPE and the perceptions towards the UPE policy. Based on the findings above, it is clear that majority of the stakeholders have negative attitudes and perceptions towards both the initiatives enabling UPE and UPE policy. As stated earlier that a person's attitudes towards his or her duties is influenced by their perceptions, for the successful implementation of UPE, it is imperative for the Ministry of Education and Sports to work towards changing stakeholders' attitudes and perceptions.

2.3.3 Knowledge and skills

According to Morey, Maybory & Thuraisingham (2000:4), as long as the thinking of knowledge as a substance to be engineered, or a material thing to be produced is upheld, success regarding knowledge and other forms of intellectual capital as hidden assets in an institution will not be considered. According to Morey *et al.* (2000:62), knowledge does not appear on the balance sheet in annual reports although they underpin value creation and future earnings potential within the institution's employees. Davenport & Prusak (1998:5), define knowledge as a fluid mix of framed experiences, values, contextual information and expert insight that provides a skeleton for analysis. Knowledge and skills are used along with new experiences and information in the minds of those in an institution through documents, institution routines, processes, practices and norms.

In order to find out if the stakeholders think that knowledge and skills are important in the implementation of UPE, stakeholders were asked if they felt that the knowledge and skills of their fellow stakeholders were sufficient for the implementation of UPE.

At national level, 50% said that the knowledge and skills of stakeholders and district and school level were not sufficient for the implementation of UPE. Some of the stakeholders

at the district level and at school level have no management skills whatsoever since they were just promoted from being teachers to head teachers and then district officials without any management training.

At the district and school level, the majority of the stakeholders interviewed (90%) said that stakeholders at national level lacked sufficient knowledge required for the implementation of UPE. They stated that the knowledge and skills of stakeholders at the national level about the whole evolution of UPE is contrary to what is real on the ground. The response from stakeholders at district level indicated that there is a lack of sufficient knowledge at national level.

The problem statement highlighted in chapter one of this dissertation states that an appropriate management framework focusing on planning and organising is important for the successful implementation of UPE to prevail. Based on the arguments above, knowledge and skills of stakeholders are imperative as they play a crucial role in the planning for the implementation of UPE.

2.4 CONCLUSION

From the above, it can be concluded that factors within either the external and internal environments in one way or another impact on the environment in which UPE is implemented. Comprising of the political, social and technological environments, the external environment is crucial to the Ministry of Education and Sports as it highlights the needs and demands of the people, the institutional structure and legislation upon which the ministry bases its planning and organising function in the realisation of its objectives to implement UPE.

The internal environment, although complex, provides insight to internal factors that would influence the motivation, perception and the knowledge of stakeholders in the implementation of UPE. The internal environment indicates the clear relationship between motivation, perception, knowledge and the stakeholders' performance. Therefore, given the nature of UPE, analysis of both the external and internal environments should not only be regarded as means to an end in itself but a very critical starting point for the planning and organising function for the implementation of UPE.

Planning which remains satisfied with reactive, survival responses to difficult and crisis situations may seem to be making the necessary minimum adjustments. It may seem to be placing the education system on the road to stability. But as long as the present inroads depict a lack of motivation, negative perceptions and lack of stakeholders' knowledge on the government initiatives persist, such an education system will remain at risk and in danger.

The following chapter will discuss the challenges in the planning and organising functions as they relate to the implementation of UPE.

CHAPTER 3: AN ANALYSIS OF THE CHALLENGES IN THE PLANNING AND ORGANISING FUNCTIONS DURING THE IMPLEMENTATION OF UNIVERSAL PRIMARY EDUCATION

3.1 INTRODUCTION

The fact that public administration involves human activity or activity for the people by the people all aiming at producing goods and rendering services to the community, the public administration needs to take cognisance of the planning and organising functions. To justify the above statement, this chapter critically defines and explains the planning and organising management functions, the processes, the principles and the advantages of these management functions, with an aim of evaluating their importance in the management and implementation of UPE in Uganda. The chapter identifies the planning and organising challenges faced by the Ministry in the implementation of UPE.

3.2 PLANNING

Starr (1971: 30) states that “the highest rewards go to those who plan and attention to the future brings benefits even in the small events of everyday life”. Cronje, Hugo, Neuland, and Van Reenen (1994:88) define planning as a fundamental element of management that predetermines what the institution proposes to accomplish and how it is to be accomplished. Whilst keeping in mind the three main perspectives of planning namely: the determination of what the institution proposes to achieve at given period of time; the actions necessary to attain goals; and what has to be done now to bring about certain situations in the future, the planning challenges in the implementation of UPE will be elaborated upon.

Starr (1971:301) states that planning is selecting a particular set of feasible decisions from among a number of alternative sets. Planning is thus, a decision making process that focuses on the future of an institution and how it will attain its goals and objectives

(Hitt, Black & Porter 2009:146). Planning is a vital function for the successful implementation of UPE to triumph given the decentralised nature in which UPE is organised.

Planning is the first step of management, found on all levels of the management ladder and it needs the support for all the other management functions making it very important for institutional success. For instance, according to Erven (2008:1), a manager is ready to organise and staff only after goals and plans of an institution are in place and leading as management function depends on the goals to be achieved. An argument also supported by Cronje *et al.* (1994:88) who state that without planning, organising would be disorganised, extremely difficult to lead subordinates and explain the future of the institution. Thus planning is of relevance for the successful implementation of UPE for an appropriate management framework to prevail, considering the decentralised nature of how UPE is organised as described in chapter one of this dissertation.

3.2.1 Types of planning

Plans are divided into three main types' namely strategic plans, tactical plans and operational plans as will be discusses below:

3.2.1.1 Strategic planning

Griffin (2000:66) states that strategic planning is general planning outlining decisions of resource distribution, priorities and action steps crucial to attain a strategic goal. Evren (2009:2) states that strategic planning is the process by which the institution's strategies are determined answering the three questions of where they are now, where they want to be and how to get there. While, according to Stoner (1982: 101), strategic planning is the process of selecting institution goals, determining the policies and strategies necessary to

attain these goals and establishing the methods necessary to ensure that the policies and strategies are implemented thus forming part of the appropriate management framework in which UPE can successfully be implemented.

According to Stoner (1982:101), strategic planning plays an important role in the institutional success and deals with fundamental questions; provides a framework for detailed planning and for day-to-day managerial decisions; involves a longer time frame than other types of planning; provides sense of coherence and momentum to an institution action and decisions over time; and it is a top-level activity in the sense that top management must be actively involved. Therefore based on these characteristics for the successful implementation of UPE to prevail, the Ministry has to acknowledge the importance of strategic planning in the implementation of UPE as it helps develop a clear-cut concept for the Ministry making it possible to formulate the plans and activities that will bring the Ministry closer to its goals, and prepare for and deal with the rapidly changing environment in which the Ministry operates.

3.2.1.2 Operational planning

Strategic planning is not the only type of planning in an institution, operational planning should also be considered. This type of planning has been seen as one that focuses on the present operations with prime concern to achieve efficiency rather than effectiveness (Stoner 1982: 102). Referring to Griffin (2000:66), operational planning focuses on carrying out tactical plans to achieve operational goals, narrowing the scope and carried out by middle and lower managers. Operational planning involves operational plans which provide details on how to accomplish strategic plans (Stoner 1982:131). These plans are divided into two categories namely (Stoner 1982:131):

- a) Single- use plans developed to attain a specific purpose and terminated when a mission has been accomplished. These include programmes, projects, and budgets.
- b) Standing plans which are referred to as standardised approaches for handling current and predictable situations and comprises of policies, standard procedures and rules.

Plans are arranged in hierarchy parallel to the institutional structure and they provide means for achieving the objectives set in the plans of the higher level and the objectives to be met at the lower level. The fact that the structure in which UPE is organised and the various stakeholders involved in the implementation of UPE as mentioned in chapter 2, for UPE to be implemented in an appropriate management framework, focus should be placed on planning as management function taking into consideration the institutional plans with in the Ministry.

3.2.2 Planning process

All in all planning is a dynamic process involving identifying of objectives, allocating resources and considering the environment in which the institution operates. The process of planning has been dissected differently by various scholars with some dividing it into six steps like Hitt, Black, and Potter (2009:146); Fox, Schwella & Wissink (1991:49) as comprising analysing external environment; analysing the resources; setting objectives; developing plans; implementing the plans; and monitoring outcomes.

Cronje *et al.* (1994:88) state that the planning process is summed up in three steps namely goal setting, involving identification and formulation of objectives, developing plans and implementation. Stoner (1982: 132), regards planning as a process which

involves four steps namely establishing goals, defining the present situation, determining aids and barriers, and developing a set of actions all leading to institutional goals. Irrespective of the different steps depicted above, planning as a process is very crucial for institutional success and if all the steps are followed, institutions and government Ministries are bound to succeed.

As already stated, education is a fundamental human right whereby every individual has a right to free education at least in the elementary and fundamental stages (Article 26 of the Universal Declaration of Human Rights, 1948). Nevertheless given the environments in which UPE operates, the right to free education is bound to frustrate any planning to manage and implement UPE. As a result, to evaluate the challenges in planning process for the management of UPE, stakeholders at all levels were interviewed through various questions of the interview schedule respectively. That was developed for the purpose of this study as illustrated below.

At national level, to evaluate planning challenges, respondents were asked to assess the responsibility of the Ministry of Education and Sports in developing policies and policy guidelines and to indicate the roles and responsibilities of the stakeholders.

Figure 3.1: Who is involved in providing and developing these policies and policy guidelines for UPE?

Hundred percent (100%) of the stakeholders interviewed at national level said that all stakeholders were involved in the providing and developing of policies and policy guidelines for UPE. A response indicating that all stakeholders at national level strongly state that all UPE stakeholders as described in chapter two of this dissertation are involved in the planning of UPE.

At district level and school level, the planning challenges were evaluated through the question; what is your involvement in the formulation of the plans, strategies, programmes and policies enabling UPE as represented in figures 3.2 and 3.3 respectively.

Figure 3.2 Stakeholders' response at district level towards their involvement in the formulation of plans, strategies, programmes and policies enabling UPE

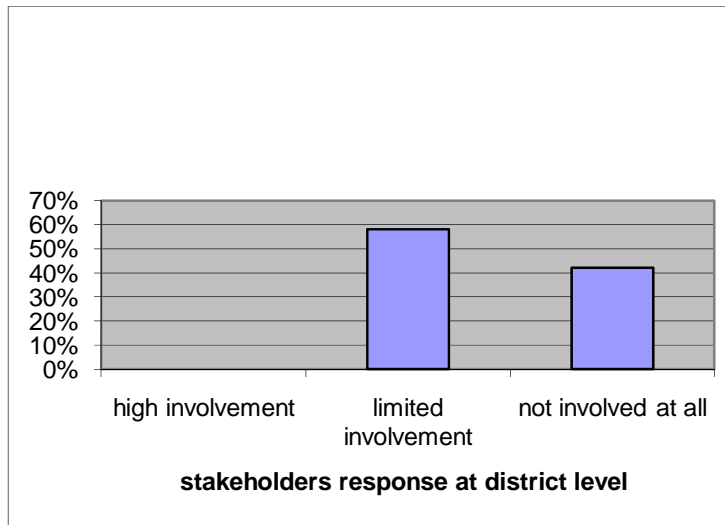
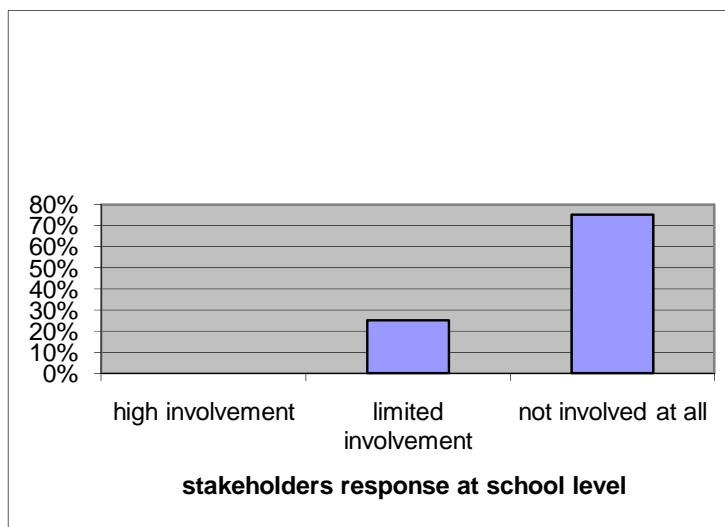


Figure 3.3 Stakeholders' response at school level towards their involvement in the formulation of plans, strategies, programmes and policies enabling UPE



Irrespective of the fact that 100% of the stakeholders interviewed at national level stated that all stakeholders were involved in the planning process of UPE initiatives, Figure 3.2 shows that out of the 12 stakeholders interviewed at district level, 58% indicated that they

had a limited involvement in the planning process while the other 42% felt that they were not involved at all. At school level represented by figure 3.3, out of the 4 head teachers interviewed, the majority (75%) indicated that they had no involvement whatsoever in the planning process of the UPE initiatives, a view well represented by the following statement made by one of the district officials

“Policies come straight from the central government as orders to the district officials to implement and communicate to the schools, while other policies are politically influenced” (interview note on August 2009).

The above clearly indicates that all plans, initiatives strategies, programmes and policies are planned at national level and sent to the district and school level for implementation. According the Ministry of Education and Sports, the planning and management of the education system requires policy dialogue, partnership and participation by the communities which will assist in improving the monitoring, supervision and ownership in the education programmes. Thus provision is made for an overview of the sector policy framework outlining sector policies that continue to underpin reforms, programmes and activities of the Primary Education sector through the Annual Education Sector Review dialogue (Ministry of Education and Sports 2007a, Bitamazire 2005:11).

However based on the response to the interview question regarding participation in planning above, it is clear that majority of stakeholders at both district and school level feel sidelined in the planning process, thus contradicting the Ministry’s requirement stated above and making it difficult to achieve participation of all in the implementation of UPE. This leads to a lack of accountability at both district and school levels, which in turn may also lead to poor implementation or no implementation of the policies, however beneficial they may be to the success of UPE.

Stoner (1982:132) states that the need for planning exists at all levels of an institution and increases at higher levels where it has the greatest impact on institutional success. According to Cronje *et al.* (1994:88); Smit & Cronje (1992:91); Fox, Schwella & Wissink (1991:49) proper planning involves:

- a) giving guidance to an institution towards attaining its aims and objectives and indicating if the institution is on track towards attaining its initial objectives;
- b) promoting coordination amongst the various employees within an institution with an aim of eliminating conflicts while promoting togetherness within an institution;
- c) promoting future oriented management so as to overcome future environmental threats towards management;
- d) enabling senior management to observe the institution as one big entity aiming at attaining the same goal;
- e) encouraging hands-on management which involves a lot creative thinking and innovation of new ideas for the future of the institution;
- f) emphasising change management within an institution;
- g) providing answers to the institutional questions regarding what should be done, how should it be done, when should it be done and by whom;
- h) providing an insight of the employee's roles and responsibilities expected by the institution;
- i) providing opportunities for increased participation in day to day activities of an institution;
- j) facilitating control towards activities performed as compared to expected standards of the institution; and
- k) creating high levels of certainty.

Based on the above mentioned advantages of planning as opposed to the interview responses, it is imperative for the planning of UPE initiatives to involve all stakeholders in order to increase their participation so as to improve the planning process, whilst facilitating an appropriate management framework for the implementation of UPE.

3.3 ORGANISING

Planning is not the only management function and its existence alone without organising, cannot guarantee the success in an institution in this case the Ministry of Education and Sports. Structure follows strategy where the development of structure comprises the organising function (Cronje *et al.* 1994:100). Organising refers to classifying and grouping functions and allocating groups of functions to institutions and workers in an orderly pattern with an aim of achieving goals (Cloete 1991:112). The deployment of institutional resources reflected in the institution's division of labour and, mechanisms for coordinating diverse institutional tasks to achieve strategic goals (Daft 2000:306). The matter of appointing individuals to assignments that blend together to develop one purpose to accomplish goals is also part of the organising function (Bateman & Snell 2007:16).

For the purpose of this study, organising as a management function will be defined as means through which roles and responsibilities are assigned to individuals and the allocation of resources so as to attain institution's objectives whilst enormously focusing on maximum communication, coordination and finance.

According to Cronje *et.al* (1994:100), organising refers to the distribution of tasks among employees, allocation of resources to both the people and departments and giving the necessary authority to certain persons to ensure that tasks are completed. It comprises of six basic principles namely specialisation, delegation of authority, coordination, maximum

communication, decentralisation and centralisation, span of control and division of labour as is be discussed below (Cronje *et al.* 1994: 101):

3.3.1 Specialisation (division of labour)

Accredited to the creative mind of Henry Ford, specialisation is referred to as the degree to which institutional tasks are subdivided into separate jobs where each employee performs only the tasks relevant to their specialised functions (Daft 2000:308). And the way, in which tasks are divided into smaller units to take advantage of specialised knowledge while promoting individual ability, reducing transfer time, increasing productivity and cutting down on training costs (Cronje *et al.* 1994:102).

Adam Smith in his book titled “The Wealth of Nations” stated that “one man draws the wire, another straightens it, the third cuts it, fourth points it, fifth grinds it at the top for receiving the head and so on”. With the same pattern going on, Smith argued that ten men could produce 48 000 pins in one day but if they work separately and independently each man in the end may only produce 20 pins a day (Adam Smith 1973: 3-4 in Stoner 1982: 253). Based on Smith’s argument that the results of dividing labour into small simple and separated operations between workers increases productivity, for proper implementation of UPE in an appropriate management framework, specialisation as an element of organising is of importance within the Ministry of Education and Sports as it will help reduce the work load of the national level stakeholders, increase productivity, and promote stakeholders participation at both district and school levels.

However, despite the above argument, it can also be argued that it is through the division of labour that the deployment of resources is reflected. Thus implying that without the

proper deployment of resources, division of labour is bound to be a failure (Daft and Marcic, 2001: 224).

Based on the findings in chapter two, it is clear that there is division of labour in the organising of UPE as depicted in the roles and responsibilities of the various stakeholders. However the real question remains how effective and efficient is the division of labour within the organising of UPE. Therefore to address the question, the extent to which systematic allocation of resources prevails in the implementation of UPE was addressed through various questions of the interview schedule that was developed for the purpose of this study as illustrated below.

In the first question posed to all stakeholders stating what is the source of finance for UPE, all stakeholders at national, district and school level (100%) respectively, indicated that the capitation grant was the main source of income for the implementation and management of UPE.

Table 3.4: What are the financial challenges that you face during the implementation of UPE?

Financial	% at school level	% of district	% of national level
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challenges	stakeholders that related to the challenge	stakeholders that related to the challenge	stakeholders that related to the challenge
Delays in UPE funds	100%	100%	100%
Fluctuation of the budget	100%	100%	100%
Inadequate amount of school finance to meet estimated expenditures	100%	100%	100%

Like was the case at National level and district levels, school level head teachers were asked to mention the financial challenges they faced during the implementation of UPE. The majority (100% per level) of the respondents cited delays in UPE funds, fluctuation of the budget (money requested differing from the money received) and inadequate amount of finance to meet estimated school's expenditures as the major financial challenges they faced. Blame is placed on the fact that the education budget at both district and school levels heavily depends on the central budget and parents' willingness to make contributions to schools. Responses indicating the majority of stakeholders' awareness and familiarity of the financial challenges faced during the implementation of UPE. Thus, providing justification that the division of labour as an element of organising is still constrained within the Ministry of Education and Sports and for the successful implementation of UPE to prevail it is vital that the Ministry tackles its financial issues.

Nonetheless, to overcome some of the financial problems, the Ministry implemented the School Facilities Grant (SFG) policy to cover infrastructural needs such as classroom construction, desks and latrines as earlier mentioned in chapter 2. However based on the

responses from the interview it is clear that even the disbursement of SFG funds is not any different from that of the UPE funds, implying that the implementation of UPE is still greatly constrained by financial challenges. A situation clearly represented by the statement made by one of the UPE stakeholders at district level:

“If UPE funds and SFG came in full and regularly then UPE would be moving on swiftly. The government says they are trying to solve the financial challenges by introducing the SFG policy. For the past two years this district has not received any SFG until last year (2008) when the government sent 1 billion Ugandan shillings for the construction of latrines, money only enough to provide 20 latrines for the entire district made up of 380 government aided schools” (Interview note July 2009).

3.3.2 Delegation of authority

Derived from the Latin word “*delegare*” which means to hand down or to give to refers to an institutionalised activity where specific activities are delegated from one hierarchical level to the lower levels in an institution (Botes 1977:10 in Brynard, Botes & Fourie 1996:95). Delegation can be divided into three types namely; the mandate, delegation based on the principle of de-concentration and delegation resulting from decentralisation of activities (Cloete 1994:134). Thus, making delegation of authority vital for any institution to succeed, based on the argument that when managers are responsible for tasks outcomes with little authority, the task will be possible but difficult leading the manager to rely on persuasion and luck. When authority exceeds responsibility, managers are more likely to become tyrants using authority to attain outcomes (Daft 2000:311). For the implementation of UPE in an appropriate management framework focus should be placed on the organising function as it pertains to the delegation of authority which needs to be examined carefully and put into practice by all the stakeholders especially those at the National level in the Ministry of Education and Sports. Delegation of authority forms an important part of the organising management

function, for without it accountability cannot be enforced in Uganda's public service so as to provide services without delay in regional and local offices.

Findings represented by figures 3.2 and 3.3, indicate that majority of the stakeholders at district and school level feel sidelined when it comes to the formulation of policies, strategies and initiatives enabling UPE, while those involved feel that they have little authority clearly indicating that there is limited delegation of authority in the management of UPE. Therefore based on the above arguments, for the successful implementation and management of UPE, delegation of authority should be emphasised so as to enforce accountability of stakeholders and encourage participation of stakeholders at all levels.

Organising as a management function is a complicated phenomenon involving much more than division of labour, departmentalisation and delegation of authority to reach the set objectives. For instance as much as arranging people and delegation of authority may be problematic, the internal structuring could be worse off and the only way to overcome this issue is by implementing other organising principles such as coordination and communication as will be discussed below.

3.3.3 Coordination

Cronje *et al.* (1994: 108) state that coordination is the amalgamation of the separate parts to form a unity and binding factor in the managerial process to enable the institution to work as a whole. Coordination is an attempt by management to develop resemblance of setting aims in the tasks of organising starting with setting objectives for the objectives which institution plans to achieve at the end of the day. Coordination is supported by institutional charts, the budget committee, broad policy and procedure in unity with the tasks carried out and information systems existing in the institution.

Kroon (1986: 284) in Brynard, Botes & Fourie (1997: 107) describes coordination as “the process whereby management harmonises the work performed by individuals and sections, to obtain good cooperation in order to achieve the business objectives in the most efficient way”. Thus based on the definitions above, coordination is an inevitable element of organising and without coordination individuals and departments may lose sight of the primary objective and effort to perform.

Table 3.5: What are the coordination challenges that you face in the implementation of UPE?

Coordination challenges	% at school level that related to the challenge	% of district officials that related to the challenge	% of national level officials that related to the challenge
Scattered schools with poor roads	“NIL”	100%	100%
Limited facilitation	100%	100%	67%
Weak linkage between levels	100%	100%	67%
Decentralised policy in centralised system	100%	100%	67%

Based on the interpretations of respondents to the interview question, a deduction can be made that majority of respondents (100% at both school and district and 67% at national level) cited limited facilitation, week linkage between levels and decentralised UPE policy operating in centralised system as major coordination challenges they face during the

implementation of UPE. While all stakeholders (100%) at the district and national level indicated the issue of scattered schools with poor roads as another coordination challenge. Thus indicating that implementation of UPE is still faced with numerous coordination challenges amidst various institutional levels.

Therefore the fact that the Ministry of Education and Sports is not different from all the other institutions and works toward the same objective, being the provision of minimum necessary facilities and resources to enable all Ugandan children of school going age to enter and remain in school until the primary cycle is completed so as to establish, provide and sustain quality accessible education that will transform society; and meet the objectives of poverty eradication by equipping every individual with the basic skills and knowledge with which to take advantage of the environment for both self and national development (Ministry of Education and Sports 1999:10). Coordination should be a prerequisite for organising to ensure that everyone works towards the UPE objectives.

3.3.4 Maximum communication

Setting lines of communication is part of organising. As already discussed, organising involves division of labour, delegation of authority and coordination, for officials and subordinates to work towards the same goal they need to communicate. As a result maximum communication as a principle of organising will be discussed.

Communication occupies an innermost role in any institutional structure and is considered as the unifying factor that combines several disorganised activities of an executive institution into a meaningful whole. That entails the transfer of information on which decisions are made for the implementation of functions or receiving of information (Brynard *et al.*1997:86). Comprising of four major components namely the communicator, the message, the medium and the receiver, communication is bound to be disrupted in

one way or the other based on the level of concentration amongst the four components, the environment and the channels used. Therefore for communication to be successful, managers have to pay serious attention to the insufficient communication media, language and cultural differences, and negligence and carelessness in the establishment of appropriate communication channels (Brynard *et al.* 1997:86).

UPE raises very many emotions among various stakeholders in the country creating enormous challenges for those responsible for implementation. Therefore to assess the challenges in relation to organising activities, an evaluation of the organising process for the management of UPE was undertaken through the question; what are the communication challenges that you face in the implementation of UPE represented on table 3.6.

Table 3.6: What are the communication challenges that you face in the implementation of UPE?

Communication challenges	% at school level that related to the challenge	% of district officials that related to the challenge	% of national level officials that related to the challenge
Large number of districts	“NIL”	100%	100%
Long distances	75%	100%	100%
Lack of proper communication channels	100%	100%	100%
Irregular feedback from the top	100%	100%	“NIL”
Limited funding	100%	100%	100%
Inadequate flow of Information	100%	100%	100%

From table 3.6 above, 100% of the stakeholders representing all levels interviewed indicated that long distance, lack of proper communication channels, limited facilitation resulting from limited finances and inadequate flow of information were the most common communication challenges they faced during the implementation of UPE. Whilst a good number of stakeholders that is 100% at both school and district levels cited irregular feedback from the central government as another challenge that they faced during the implementation of UPE. Responses to this question from all the stakeholders indicate that a large number of stakeholders feel that there is a lack of efficient and effective communication for the implementation of UPE. This Implies that the Ministry of Education and Sports, has not yet adequately engaged the organising activities and interpretation of the goals and objectives for the management of UPE, irrespective of the fact that communication “*occupies the central role of any institutional structure and regarded as a binding*

factor that binds fragmented activities of an executive institution into a meaningful whole” (Brynard *et al.* 1997:86).

Therefore in the light of the above mentioned elements of organising, communication plays an important part in the success of the institution especially decision making. For example it is only through adequate communication within the institution that information is transferred and processed correctly in a meaningful way implying that stakeholders must pay critical attention to both the quality of communication and the volume of information before making decisions. And given the diversity, language and the cultural differences in Uganda, for the implementation of UPE to be successful, the Ministry of Education and Sports must emphasise the importance of communication in organising and also make sure that officials are proficient in the different languages involved.

3.3.5 Centralisation and decentralisation

Given the extensiveness of the Ministry of Education and Sports and the fact that variety of services are expected from this Ministry, the Ministry of Education and Sports as a whole and its head officials are bound to be faced with the problem of whether to centralise and decentralise their activities. And to overcome this issue, measures should be taken to assess whether the efficiency can be improved through decentralising or centralising of executive functions.

The Constitution of Uganda 1995 (Act 13 of 1995), provides for decentralisation as a guiding principle applied to all levels of government in order to ensure citizens participation, and encourage domestic control in decision making thereof as well as providing the local government councils autonomy in-terms of planning, financing and management of services. And in 1998, the mandate was officially extended to management of UPE under the Education Strategic Investment Plan 1998-2003

exercised through the distribution of UPE funds and instructional materials (Mushemeza 2003:8). In terms of organising, the Ministry of Education and Sports is the main actor in the implementation of UPE but with responsibilities divided between the Ministry of Education and Sports and local authorities under the leadership of the chief administrative officers (CAO), and other stakeholders such as the members of Parliament, district education officers, founding bodies, head teachers, school management committees and non-governmental Institutions as described in chapter one all representing the level of decentralisation in UPE (Bategeka 2005:4; Hon. Bitamazire 2005:11; Yan *et al.* 2007: ii, Murphy 2003:6; Umoh 2003:9).

Centralisation in this case means that all decision making authority is vested in one person while decentralisation is the process whereby power and authority have been delegated to lower levels of the institution (Brynard *et al.* 1997:102). Irrespective of the definitions, it is important to note that both aspects can co-exist but the one an institution chooses to implement while exercising its executive functions entirely depends on the mandate given to the institution. Most importantly, managers must have clear theoretical and philosophical knowledge about the two aspects before putting them into practice (Brynard *et al.* 1997:104-105).

For instance while centralising an institution may lead to maximum control resulting from constant supervision of heads of departments; create greater degree of standardisation and promote equality in the treatment of all people taking part or affected by the activities of the institution, centralisation may also result into delays in the decision making, occurrence of too much routine work and idealistic functions resulting into administration on assumption (Brynard *et al.* 1997:105). Decentralisation, if implemented, may lead to the abolition of unnecessary delays at the point of implementation due to the fact that even lower level officials can make decisions; development of adaptability of activities due to the fact that officials at lower levels are better informed about the conditions in which

functions need to be performed; and provide head office staff with the opportunity to focus more on long term-planning and overall policy making (Brynard *et al.* 1997:105). However, despite the advantages stated, as result of extended communication decentralising may cause coordination and control problems, lead to difficulties in standardisation of activities and may make specialisation more difficult given that in decentralised institutions, activities are diconcentrated to various lower level offices with divergent needs.

Brynard *et al.* (1997:106) state that, both decentralisation and centralisation functions have humanitarian, judicial and functional dimensions that have to be taken into consideration by mangers before choosing to centralise or decentralise executive functions. Unless when public activities are large in volume and dimension, then there should be progressive decentralisation.

Based on the findings in chapters two, there is a great diversity in both the external environments within which UPE is implemented and internal environment, further complicated by the institutional structure. This has a significant impact on the possibility of successful management of UPE.

From the analysis on the situation on the ground in reference to the stakeholders' responses as represented in figures 3.2 and 3.3, it is clear that the system of decentralisation is still fragile with districts still predominantly taking guidelines from the central government rather than taking the lead in identifying priorities and raising funds for implementation of these priorities. Therefore from the above, it can be concluded that to ensure that qualitative rendering of services is brought as close as possible to the public, leaving the head office to take care of overall policy making, coordination and

communication functions, decentralisation as an element of organising is of the essence for the successful implementation of UPE.

3.3.6 Span of control

According to Brynard *et al.* (1997:75), span of control is the individual ability to supervise a given number of subordinates depending on the prevailing circumstances in an institution i.e. the work load that needs to be done, location of the subordinates, the complexity of the work, ability of the supervisors and level of training amongst the subordinates. Represented by two different structures namely (Brynard *et al.* 1997:78):

- a) the high or the sharp pyramidal structure representing a limited number of subordinates per supervisor; and
- b) the low pyramidal structure where the supervisor has a vast number of subordinates under his direct supervision and control characterised by short lines of communication, great team spirit and flexibility in performance.

From the above, it can be derived that the span of control structure depends immensely on the ability of managers to direct and the capability of subordinates to carry out their roles and responsibilities. That is to say if the manager lacks the ability to perform, no amount of training given to subordinates will facilitate a wide span of control and *vice versa* (Brynard *et al.* 1997:79).

Based on the findings in chapter two, the fact that 50% of stakeholders at national level acknowledged that there was a lack of capability of lower level stakeholders caused by lack of training; it can be argued that the span of control within the organising of UPE is still challenging. Therefore for the successful implementation of UPE with an appropriate management framework focusing on planning and organising to prevail, it is imperative

for the Ministry of education and Sports to strongly focus on the span of control as an element of organising as it will ensure that there is efficient training of stakeholders and ability to fulfill their roles and responsibilities.

3.3.7 Unity of command

Brynard *et al.* (1997:82) states that unit of command is the cornerstone of organising practices that identifies how authority flows from the peak to the ground of an institution whilst clarifying who gives orders and who carries them out. And for the success of any institution, it must be sustained as a vital organising function to avoid unnecessary conflict amongst subordinates.

According to the literature provided in chapters one and two, a deduction can be made that UPE is a decentralised policy implemented in a centralised system. Although stakeholders at district level are attached to decentralised offices and accountable to such offices, they also have a responsibility towards certain officials at the head office in one way or another. This scenario best depicted in the budgeting of UPE where by although Article 176 of the Constitution of the republic of Uganda 2005 and Local Government Act of 1997 provides for education to be managed by district councils with each district having the authority to formulate, approve, budget and execute its own development plans, in relation to UPE, districts still receive money from the central government to fulfill their roles and responsibilities. And despite the fact that it is the role of the districts to plan for the UPE budget, the UPE budget is still based on the Indicative Planning Figures sent from the central government dictating the amount that will be allocated towards each district on which the budget should be based. This makes conflicting commands amongst stakeholders inevitable within the implementation of UPE. Therefore for the successful implementation of UPE within an appropriate management framework focusing on planning and organising to prevail, it is very important that the ministry of education and

sports maintains unity of command as far as possible as an organising function to avoid unnecessary-conflicting commands amongst stakeholders.

Rue & Byars (1992: 232-240), state that no matter the size of the institution, the results will be more effective if management principles of organising are applied. Effective organising will depend on various fundamentals starting from the environment to the size of the institution or department. Therefore based on the organising elements stated above, it is clear that significantly successful, recognition of objectives in any institution is attainable. And although organising as a process differs, the process is a necessary step in the management of any institution new or existing. For example in the new institution, decisions have to be made concerning the crucial equipment, supplies, processes to be followed, the people to perform the tasks and then a framework indicating the distribution of tasks drawn up. On the other hand, in the existing institution, organising has to be reviewed relentlessly and adopted to accommodate new products, new processes and changes which affect managerial activities (Cronje *et al.* 1994:100).

This implies that irrespective of the fact that the Ministry of Education and sports falls in the category of existing, for the implementation of UPE to succeed, not only planning as management function should be considered but also organising. Thus, irrespective of the above knowledge on organising, and the fact that organising as a management function takes place amid many factors each of which impacting on institutional success, efficient and effective organising according to Cronje *et al.* (1994:100) and Stoner (1982: 251) entails:

- a) ensuring that the joint and coordinated effort on management has a much better, greater and more effective result than the sum of individual effort;
- b) promoting the productive application and utilisation of resources;

- c) dividing the total workload into activities that can be comfortably performed by an individual hence promoting higher productivity;
- d) making it possible for a department to achieve their goals and objectives, coordinate the activities of managers and subordinates so as to avoid unnecessary duplication of tasks and obviate possible conflicts;
- e) reducing the chances of doubts and misunderstandings thereby enabling the institution to alter its objectives effectively; and
- f) giving stability and reliability to the actions of its members which are requirements for an institution to move coherently towards attaining its goals.

Justifying the relevance of organising as management function to the Ministry of Education and Sports is to achieve its main objective of providing free primary education to all. Therefore for the successful implementation of UPE to prevail in an appropriate management framework focusing on organising to excel despite the above mentioned financial challenges, the Ministry of Education and Sports has to take note of the fact that strategies will not be possible if there is a lack of systematic allocation of resources, coordination, and maximum communication.

3.4 CONCLUSION

Planning and organising management functions appear to be important aspects which need careful deliberation and consideration during the implementation of UPE. Planning is the first step of management, found on all levels of the management ladder and it is the support for all the other management functions making it very important in institutional success. Without planning, organising would be disorganised, extremely difficult to lead subordinates and explain the future of the institution. As a matter of fact, considering the aims and objectives of UPE, the institutional structure and the various stakeholders

involved, there will in all probability be need for efficient and effective planning and organising to ensure quality and efficient implementation of UPE.

As discussed in this chapter it is clear that irrespective of the planning and organising initiatives in place, the Ministry of Education and Sports is still experiencing planning and organising challenges. The next chapter will discuss international best practices in the management of UPE and propose a comprehensive planning and organising framework of UPE in Uganda.

CHAPTER 4: A COMPREHENSIVE PLANNING AND ORGANISING FRAMEWORK FOR THE MANAGEMENT OF UNIVERSAL PRIMARY EDUCATION

4.1 INTRODUCTION

The most persisting issue globally is providing all children of school going age with free quality basic education despite the acknowledgements of the importance of primary education (Johnson 2009:1). According to Johnson (2009:1) *“130 million children between the ages of six to twelve have no access to basic education while 150 million have dropped out of school”*. Irrespective of the scanting figures and the statement above, a number of countries have committed themselves to provide UPE to all children of school going age irrespective of colour, gender, and disability. Some countries have made primary education compulsory, including China, Chile, Cuba, the Republic of Korea, Brazil, Mexico and Bangladesh to mention but a few (UN Millennium Project 2005: 3).

Given that the management of UPE in general is a daunting challenge to Uganda's Primary Education Sector, the same could be argued for all countries that UPE requires planning, organising, consultation, coordination and maximum communication from both the top management down to school level and *vice versa*. Referring to the challenges highlighted in chapter 3, the management of UPE is not an easy task and therefore should not be taken for granted. This chapter highlights the implementation of UPE in three countries, namely Mexico, Bangladesh and Kenya, with secondary examples from other countries. The chapter explores the gaps, trends and international best practices in the management of UPE in these countries and draws deductions from which a comprehensive organising and planning framework for UPE in Uganda could be proposed.

4.2 MANAGEMENT OF UNIVERSAL PRIMARY EDUCATION IN MEXICO

Before the 19th century, education in Mexico was a private initiative with literacy programmes being provided for by the Roman Catholic Church. Different parties supported different education levels but when President Porfirio Diaz came into power, a secretariat of public instruction (SIP) was created to try and change people's perceptions towards education. However due to lack of support as result of high illiteracy levels in the country, the programme phased out and only resurfaced as the *Secretaria de education pu'blica* (SEP) also referred to as the Ministry of Education. The SEP lacked the support of many, but it was able to lobby for education to be free for all Mexican citizens and as result the notion was represented in Article 3 of 1917 of the Constitution of Mexico, 1917 and the general law of education which still applies up to today (Santibanez, Vernez & Razquin 2005: 66-65).

Operating in a centralised system until 1992, Mexico experienced a strong national control of basic education with the SEP and the teachers union (SNTE) holding most of the political power in education policy making and implementation. The SEP had the central authority and nothing was done in terms of research or education reform without its involvement and authorisation. The SEP sets all guidelines concerning teacher salaries, school calendars and school days. The SNTE is only involved in the administrative duties and authority to approve all major reforms and policies before being implemented (Santibanez *et al.* 2005:65; Rangel & Thorpe 2004:568).

After decentralisation in 1992, education in Mexico was provided for by institutions under the jurisdiction of the federal, state and municipal government, as well as private institutions accredited by the SEP. Following the guidelines stated in Article 3 of the Mexican Constitution of 1917 and the General Law of Education, all individuals have a right to receive education and the State has an obligation to provide compulsory and free basic education services at all levels. The General Law of Education (GLE), passed in

1993 and further amended in 2002, widens and reinforces the above principles by clarifying the rights and obligations for federal and state authorities stating that it is SEP's responsibility to guarantee the national unity of basic education, improve its quality, and seek equity in the access to these services. The GLE establishes that it is the state's obligation to provide initial and basic education, including indigenous and special education services, as well as teacher training programmes (Santibanez *et al.* 2005:7).

Currently, primary education in Mexico is compulsory and free to all Mexican citizens and is delivered in three modalities namely: general, also referred to as the traditional approach that uses approved and uniform national curriculum; bilingual-bicultural and community using different versions of the national curriculum with textbooks translated in local languages (Santibanez *et al.* 2005:7). In addition to education being delivered in three different modalities, education is also divided into pre-school comprising of grades 1-9 which is compulsory and free of charge, upper secondary education consisting of grades 10-12 and higher education (Santibanez *et al.* 2005:7).

Financially, Mexico spends about 5.9% of its gross domestic product on education which is above the percentage provided by the Institution for Economic Co-operation and Development (OECD) and is highest in the world and a quota of the Mexican programmable budget. Irrespective of the high figures, an equivalent of \$ 1.350 is spent per student per year on education. Funds are distributed taking into consideration the supply and financial reform instituted in 1997 dictating the number of teachers and schools supported by the federal SEP in each Mexican state (Santibanez *et al.* 2005:12).

Irrespective of the fact that Mexico spends above the OECD percentage, the country's UPE programme still faces financial challenges which can be attributed to the way the funds are distributed. Given that the funds are distributed according to the number of

schools and teachers in the state, small states with fewer schools are bound to receive less when compared to the large federal states. The result is funding disparities in Mexico hence impacting on the management of primary education in the country (Santibanez *et al.* 2005:15).

In addition to the financial constraints, the cultural diversity of Mexico, the geographical conditions and patterns of industrialisation and growth are other factors constraining the development of UPE in Mexico. Poor educational quality is still, and remains a key issue in the primary education of Mexico with less than 20% of sixth graders even scoring a satisfactory competency in math. While in lower secondary schools, where access and demand issues have kept out people with higher direct and indirect costs of schooling, the percentage of students achieving competency in math is still at 50% in addition to the poor performance in international exams. This problem has been attributed to issues such as lack of adequate teacher preparation and changes in the curriculum. Primary schools meet for only four hours a day leaving little time for teachers to interact, evaluate students and even prepare for lessons. As children proceed from grade six they have to switch from a highly broad-subject based curriculum to a highly specialised academic ten subject curriculum in lower primary (Santibanez *et al.* 2005:29-31).

As a result, to address the above issues and strengthen UPE in Mexico, the SEP initiated a programme entitled PROGRESA also referred to as '*oportunidades*' in 1997 as an integrated approach to poverty alleviation. Joined with health, the programme focused on improving school enrolment, attendance, performance through providing cash subsidies, also referred to as educational grants to poor families that cannot afford to send their children to school regularly; monitoring support for acquisition of school materials and cultivating of parental responsibility for the appreciation of the advantages of education. The purpose is to break the generational cycle of poverty whilst promoting primary education.

For the programme to excel, education grants were used to encourage parents to send their children to school while cash transfers were only given to mothers whose children maintained an 87% attendance rate as per school records (Gantner 2007:1-4). In addition to the above programme, to address the challenge of quality, the SEP initiated the *Programa Escuelas de Calda* (PEC) also referred to as the quality schools programme to assess schools from a classroom perspective. The PEC makes the funds available to schools to enable them develop and implement their own reform plans and to foster community teacher-participation, shared leadership, flexible teaching practices and increased accountability (Santibanez *et al.* 2005:77).

To control the rapid enrolment levels that resulted from the free and compulsory primary education, the SEP introduced the double shifting programme allowing teachers and students to attend schools during the morning, the afternoon or the evening shifts. Additionally, there is long distance learning to help provide education to out-of-reach areas for a period of 15 minutes with the help of one facilitator-teacher per grade to guide students through school work (Santibanez *et al.* 2005: 16-19).

In order to address the challenge caused by industrialisation, such as the lack of attendance from seasonal migrant workers' children, illiteracy and institutional capacity on the side of teachers, the SEP initiated the Primary Education Programme for migrant children in 1997. Teacher training programmes such as the National Program for Continuous Updating of Basic Education Teachers were introduced in 1996 in order to improve the knowledge and skills of in-service teachers and the National Teacher Incentive Programme also referred to as *Carrera Magisteria* to improve teachers' salaries through a competitive process that evaluates teachers and their students. To improve the literacy levels, the SEP initiated the *Programa Nacional de lectura* referred to as the National Program for Reading to enhance reading and literacy among basic education

students with an involvement of both the teacher and the student (Santibanez *et al.* 2005:78).

Looking at the above description in terms of Management of UPE in Mexico, provision of cash subsidies to poor families, making funds available to schools, motivation of teachers through providing incentives and conducting primary education in shifts are contributing factors to the success of free primary education. Thus, implying that for the successful implementation of UPE to prevail in an appropriate management framework focusing on planning and organising, the Ministry of Education and Sports in Uganda has to implement the similar programmes as Mexico has done. For instance by adopting programmes such as PROGRESA and *Programa Escuelas de Calda*, the ministry may be able to address financial challenges such as delays in UPE funds to schools, as well as poverty related challenges constraining UPE. Also based on the findings in chapter two as regards to motivation, it is imperative that the Ministry of education and Sports adopts a motivation strategy such as the *Carrera Magisteria* initiative to credit hard work from stakeholders through providing transport facilities, merit awards to basic schools based on results, bonuses, houses to teachers and improve working conditions so as to attract more teachers to fill all existing vacancies.

4.3 MANAGEMENT OF UNIVERSAL PRIMARY EDUCATION IN BANGLADESH

Primary education in Bangladesh is free, compulsory and maintained by the government with more than 83% of children enrolling (PEDPII Baseline Survey 2006:3). Before any form of formal education in Bangladesh, basic education was provided informally by opinion leaders and was predominantly theological and philosophical. Due to religious, cultural and political changes, including moving from Hinduism, pragmatic Buddhism to egalitarian Islamic values, education in Bangladesh changed and the idea of UPE surfaced in 1947 although was abolished in 1953 (Khatun 1992:iii). After independence in 1971, the new government decided to officially make primary education free by providing

for it in the Constitution 1972 stating that primary education would from then be provided by the government and a fundamental right to all citizens (Article 17 of Constitution of Bangladesh 1972). To strengthen primary education in Bangladesh, the Mujib government, at the time adopted various measures and among these are the first five year plan (1973-1978) focusing on instructional materials which informs schools construction, attracting children to school and keeping them in school until completion as well as developing curriculums. Among other initiatives was the formation of the Kudrat-Khuda Education Commission to carry out research, advise government on plans, objectives and strategies on how to modernise education (Rabbi 2009:13).

Referring to the research and recommendation from the Commission, by the year 1985 the third five year plan was in place and emphasising a 10% increase in student enrolment, reconstruction of schools, and repair of schools and revision of the primary curriculum all in the name of UPE. Thus, by the year 1993 also during the fourth five year plan, to strengthen the UPE policy in Bangladesh, law was passed declaring all primary education not only free but also compulsory (Rabbi 2009:14).

Despite the changes in government, commitment to UPE in Bangladesh continued between 1997-2002, with 1,046 satellite schools in place, massive investment at \$1,600 million injected in primary education for a period of five years on top of the activities in the first, second third and fourth five year plans (Rabbi 2009:18).

Primary schools are the main focal points of the entire primary education system and it is the responsibility of the central government to see to it that they are well managed. Organised in a pluralist system, primary schools in Bangladesh are divided into various categories namely: government primary schools that don't charge fees; registered non-government primary schools managed and supervised by government bodies; non-

registered primary schools run by government bodies; community schools; Primary Teacher Institutes (PTI) attached experimental schools controlled and run by the government; religious schools; kindergartens and non-governmental schools (Rabbi 2009: 33; Chowdhury, Nath & Choudhury 2001:4).

For effective management, UPE in Bangladesh is provided for by government, the private sector and NGO's but remains in actual fact publicly financed. It is organised in a decentralised manner with the Ministry of Primary and Mass Education (MoPME) at the centre led by the secretary of government responsible for the overall planning, financing, policy formulation, evaluation, execution of plans and, initiating legislative measures related to primary and non-formal education. The Directorate of Primary Education is divided into six divisions namely Administration, Planning and Development, Training, Monitoring and Evaluation and Policy and Operations created to streamline UPE and strengthen its infrastructure. Reporting to each Directorate is the Division which comprises six offices of divisional directors located at each division head-quarter. District education offices headed by district primary education officers are responsible for the administrative tasks and supervision of all primary schools in their district. The sub-districts (*Upazila*) made up of 481 *Upazila* education officers and school clusters are responsible for the management, monitoring of primary education and provision of in-service training of all teachers in their respective clusters (Rabbi 2009:33). All in all, this creates a positive perception towards primary education and makes it possible for the effective and efficient implementation of the UPE policy in the country.

Even though the general perception of UPE in Bangladesh is positive with the national primary education enrolment rate at 80%, the country is still experiencing management challenges (Ardt, Hastings, Hopkins, Knebel, Loh & Woods 2005:6). According to Rabbi (2009: 40), the national budget allocation towards education is relatively low as compared to other South Asian countries. Allocating only 2.3% of its Gross Domestic Product (GDP)

compared to the 3.5% regional average and the fact that the budget revenue is the primary instrument financing education expenditure, financial constraints are inevitable in the country. This has resulted into poor payment of primary school teachers, inadequate allocations on day-to-day school activities, poor infrastructure and delays in school planning forcing head teachers to seek for funds elsewhere and in the end hampering the attainment of the UPE goal.

With 45% of the population in Bangladesh struggling to meet their basic needs and surviving on one dollar a day, the country's primary education is also faced with the problem of poverty impacting on household demands for primary education. Children of school going age are forced to stay at home and seek job opportunities in order to meet their basic needs and sustain their family, which leads to an even bigger challenge for primary education resulting in child labour (Ardt *et al.* 2005:9).

As a result of industrialisation attributed to the increasing exposure to the forces of globalisation, a decline in the agricultural sector in Bangladesh, the country is also faced with the problem of urban-rural disparity and the unequal development between towns. This has resulted in low attendance among children, especially those in the urban poor regions (slums) with few schools within their reach. Overcrowding in the classrooms, low participation from the students and an increase in the student teacher ratio all negatively influence the efficiency of education. Teachers cannot keep up with large classrooms holding back the implementation of UPE policy (Ardt *et al.* 2005:6).

Due to the cultural diversity, beliefs and norms of Bangladesh, the success of primary education is still restrained with issues attributed to culture. Some individuals still believe that boys should receive first priority in going to school as opposed to girls and education should be provided based on one's class in the society (Rabbi 2009:25)

To put a stop to the above challenges, the government of Bangladesh created different measures, among them was free and compulsory education for all. By 1990 no child was to stay home because of a lack of teachers, learning materials, classrooms, irrespective of gender or income. Authority was given to committees to ensure that all children residing permanently in their areas of jurisdiction, registered and attend school regularly, while failure to comply led to a fine of not more than 200 *Taka's* (Compulsory Primary Education Act, 1990, (Act 27 of 1990)). To strengthen UPE further, in 1992 a series of textbooks and teachers' guide books were introduced, and by 1999 a curriculum based on 53 competencies had also been put in place (Rabbi 2009:26).

To overcome the food shortage associated with the high levels of poverty, the government established the Bangladesh Food For Education (FFE) Programme, an international best practice in UPE and the first ever food for education programme was launched in 1993. The programme was designed and administered at national level to provide free monthly food supplies to poor families. The families are to meet their monthly food demands and will send their children to school instead of retaining them home or even sending them to work. For the programme to be successful, economically backward unions with low literacy levels were selected amongst government, registered non government, community schools, satellite primary schools and one religious school (Ahmed & del Ninno 2002:13-20). As a result of the Programme, enrolment in primary education has increased and out of the 5.2 million children that enrolled in 2000, 2.1 million were beneficiaries of FFE programme. The enrolment in Bangladesh and the success of UPE in the country has greatly benefited from the supportive programme.

In addition to the above and to close the gap between urban and rural schools, the government of Bangladesh established the Bangladesh Rural Advancement Committee (BRAC) in 1985. The purpose was to increase the reach of school activities to include out of school children. Emphasising participation, the BRAC focuses on enrolment of children

in the poor rural and urban areas where access to a formal education system is limited. BRAC address the realities of poor children focusing mainly on particular sub-groups like adults; rural communities and ethnic minorities (Ardt *et al.* 2005:123). Operating as the largest nongovernmental institution in the field of education in Bangladesh, BRAC currently provides non-formal primary education to over 1.2 million children out of the 1.4 children receiving primary education. Based on the success of the BRAC programme, in 2008 the government decided to delegate its role of monitoring all primary schools in Bangladesh to BRAC (Rabbi 2009:38) thus, indicating the importance of NGOs to the development and success of primary education.

In Bangladesh as a means of increasing awareness of primary education, the government expressed a renewed commitment to the integration of young labourers into the primary education sector through its Second Primary Education Development Program (PEDP II) under the Basic Education for Urban Working Children Project. The Programme aims to *“provide non-formal education and life skills for 200,000 children (60% girls), impart livelihood skills training; undertake social mobilization activities to raise awareness of child labor issues and to advocate for the elimination of the worse forms of child labour”* (Ardt *et al.* 2005:10). All in all, aiming vastly at improving primary school access, participation and completion in accordance with the Government's 'Education For All' (EFA), Poverty Reduction Strategy, Millennium Development Goals (MDGs) and other policy commitments along with the quality of student learning and achievement outcomes to Primary School Quality Levels (PSQL) standard (Ardt *et al.* 2005:10; PEDPII Baseline Survey 2006:4).

As way of strengthening institutional capacity and as a means of increasing teacher numbers, the government of Bangladesh developed a National Academy for Primary Education (NAPE) at national level; Primary Teacher Institutes (PTI) and, Sub-district (*Upazila*) Resource Centers (URC) at the *Upazila* level to provide training to teachers,

supervise primary teacher institutions, organise officers' training research workshops and seminars, organise subject training for primary teachers and, train teachers on pedagogical aspects and subject teaching methods to promote quality in teaching as means of improving primary education (Rabbi 2009:34).

Although Bangladesh is considered as a developing country, and despite the pervasiveness and depth of poverty and vulnerability to national calamities, according to UNDP (2010:7), Bangladesh has already achieved gender parity and made progress towards increasing primary enrolment with half of the 16.2 million students enrolled in primary school being girls, and a 97.4% Gross Enrolment Rate. Therefore based on these facts and the findings in chapter three for the successful implementation of UPE in appropriate management framework focusing on planning and organising to prevail, examples such as providing free monthly food supplies to poor families to meet their monthly demands in exchange to sending their children to school; and strengthening of the role of the community and non government institutions to include monitoring and evaluation should be taken into consideration by the Ministry of education and Sports.

4.4 MANAGEMENT OF UNIVERSAL PRIMARY EDUCATION IN KENYA

Perceived as the most general of all education skills and a basic human right, primary education in Kenya is based on objectives such as to convey literacy, numeracy and developmental skills; develop a measure of logic through personal judgment ; develop self-expression and utilisation of the senses; lay foundation for further education; develop awareness and understanding of the environment; to develop the whole person including the physical, mental and spiritual capacities; and appreciate and respect the dignity of labour and to develop positive attitude and values towards the society (Nafula 2001:102). To fulfill these objectives and meet with the demands of primary education, the government of Kenya, under the leadership of the National Rainbow Coalition Party (NARC), announced Free Primary Education (FPE) in 2003. It is organised in a

decentralised manner with various stakeholders at national, district levels and school level. The Ministry of Education, Science and Technology takes the overall responsibility for planning, recruitment and the payment of teachers and overall funding of FPE. At district level with the help of the district education officers, quality assurance and standards officers (QASOs) make sure that there is effective utilisation of FPE funds provide for, up to date statistics on enrolment and FPE disbursements (Sifuna, Oanda and Sawamura 2008:37).

In terms of funding, expenditure on education in Kenya is attributed to both the government and international donors with the government allocating between 35-40% on education of which 51% goes to the primary education sector annually and about Kshs, 4.5 billion from international donors. To see to it that the funds reach the schools and are well accounted for, during the implementation of free primary education the Kenyan Ministry of Education, Science and Technology established a system in which all 18,000 public primary schools receive capitation grants straight from the Ministry through two bank accounts namely: SIMBA (School Instructional Materials Bank Account) which covers direct teaching and learning materials; and the General Purpose Account (GPA) which carries various costs including wages for support staff, repairs, maintenance, quality assurance, water and electricity. Both are managed by the school management committees (SMC) (Nafula 2001:107).

Irrespective of the above, and according to Sifuna & Sawamura (2009: 53) and Nafula (2001:107), substantial problems still exist with regards to initial access, inherited geographical and gender disparities, low enrolment rates compared to the demand of primary education, especially children with special needs where “*the portion of the handicapped receiving formal education is far below their share of the population*” (Nafula 2001:107). High dropout rates occur due to various reasons, such as culture which demands that girls stay home to take care of sick parents, or work in the fields and boys,

from the nomadic pastoral communities to take care of livestock. In addition to the above constraints, according to Sifuna & Sawamura (2009: 53) the implementation of UPE in Kenya is also faced with irregularities in terms of policy implementation where the majority of the stakeholders are confused over the meaning of the FPE Policy and their roles and responsibilities in the implementation of the Policy.

Despite the high expenditure on primary education, the amount of the grant per pupil per year is inadequate as compared to the cost of maintaining schools. For instance, each child, irrespective of the location, receives K.shs. 1020 per year to be spent on instructional materials and maintenance, with no provision for buying new school facilities like furniture and construction (Sifuna & Sawamura 2009:66,76). Coupled with late releases of the funds to schools, mismanagement and corruption, this has made it difficult for planning leaving schools with no choice but to collect school fees as well as levies from parents.

To try and close the gaps in the implementation of FPE in Kenya, the government has established school management committees to try and link the community, head teachers, district officials and the Ministry of Education, Science and Technology which will assist schools in the administration, the management of funds and decisions on spending (Sifuna *et al.* 2008:43).

In addition, in order to strengthen primary education, the Kenyan Sector Support Programme was launched in 2005 as a master education plan for the country. The objectives include promoting access to primary education with the aim of achieving an enrolment ratio of 100%; quality and relevance of education through the establishment of units responsible for quality development in various provinces, and efficiency and effectiveness of resource mobilisation, allocation and utilisation in order to improve the

status of primary education (Nafula 2001:8). Among other initiatives to improve the implementation of UPE, Kenya has also formulated a food programme in conjunction with the community which provides for porridge at breakfast (prepared using local ingredients) for primary school children in order to improve nutrition, participation and school attendance. The government also implemented a primary school de-worming programme in 1998 as a treatment of intestinal parasites such as hook worms, roundworms, whipworms and *Schistosomiasis* all common among children in the rural areas of Kenya and a hindrance to school attendance. The programme covered rural populated poor farming communities, offering *Albendazole* treatment every six months to all children in school with the ultimate objective to enhance student's performance (Birdsall, Levine, and Ibrahim 2005: 143-146).

The study in this section establishes the relationship between enrolment and feeding and disease, as well as the importance of a link between the central government, the district officials and the community. Thus based on the findings in chapter three, for successful implementation of UPE within an appropriate management framework focusing on planning and organising to prevail, examples such as strengthening the role of School Management Committee (SMC), sending finances direct to the schools bank account and initiation of feeding programmes should be taken into consideration by the Ministry of Education and Sports in Uganda.

4.5 INTERNATIONAL BEST PRACTICES IN THE MANAGEMENT OF UNIVERSAL PRIMARY EDUCATION ELSEWHERE

Irrespective of the fact that various countries agreed at the same time to the second Millennium Development Goal to provide free education to all children of school going age, different countries implementing UPE are at different stages when it comes to the planning and organising of UPE. For instance while some countries like Bangladesh, Chile, Mexico, Madagascar and Zambia have managed to meet most of the UPE

indicators such as literacy, low teacher to pupil ratio, high attendance rates, low dropout rates, quality, equity and even high completion rates, countries like Uganda, Somalia, Liberia, Cape Verde and Equatorial Guinea are still lagging behind (Birdsall *et al.* 2005:1; UNESCO 2010:1). Therefore given the different levels of success in the implementation of UPE, to come up with a concrete institutional framework in which UPE in Uganda can be implemented, best practices in the management of UPE elsewhere in the world will be discussed in this section.

As part of capacity building to overcome institutional weakness in the management of UPE, teacher training programmes as well as reward systems have been introduced. In Malawi, for instance, to lower pupil teacher ratio and deal with high enrolment levels, the In-service Teacher Education Program (MIITEP) was initiated with the majority of trainees being untrained teachers. The Programme is implemented using a mixed-mode consisting of college based training and distance school-based training to build capacity of teachers in the country (Kunje, Chiremba and Ogawa 2008:63). The Program is based on supervised distance learning for two years and has proven that school –based training is possible even in very resource-poor environments. The Program uses locally-written, well illustrated student teacher handbooks, which outlines the structure of the course and stimulates discussion; zonal seminars for trainees, where practical and relevant skills are exchanged; and enables the successful mentoring between experienced teachers and trainees (Kunje *et al.* 2008:63).

In Chile, to strengthen institutional capacity, the country put in place a national reward system referred to as SNED to provide incentives to teachers depending on their school performance. Implemented with an objective to monitor school quality, the system provides merit awards to basic schools-based on the results of high performance in language tests and mathematics; school management initiatives such as teachers' workshops and participation in school governance; schools' working conditions;

coordination between teachers and parents; and how well children from poor backgrounds are integrated into schools. With the consideration of the above, awards are passed on to basic schools which are then paid directly as bonuses to all teachers in that school (Birdsall *et al.* 2005:122).

According to Avensteup, Liang & Nelleman (2004:18) “*without commitment to carry out what is needed and the willingness to devote oneself to the task capacity remains an objective*”. Given that head teachers and teachers play a pivotal role in both the implementation and management of UPE, the Ministry of Education and Sports in Uganda should focus on the training and provision of incentives in the form of bonuses to teachers and head teachers in order to increase capacity, knowledge and skills while maintaining efficiency, quality and effectiveness in the management of UPE.

To promote awareness in Brazil, the Education Secretariat of the State of Parana in Brazil introduced the *Boletim da Escola* in 2001, an annual school report card of performance for each primary and secondary school under its jurisdiction. The report card covers student achievement and parents’ opinions seeking to increase awareness and engagement of the community in UPE. As a result, in 2002, approximately 1.3 million report cards were distributed increasing interest and boosting communication between the teachers, administrators and the community (Birdsall *et al.* 2005). For effective management of UPE communication is essential as it will provide information essential for planning.

In El-Salvador, initiatives like EDUCO have been implemented to promote coordination through community partnership. The initiative started in 1991 based on the principles of sharing responsibility for basic education coverage with the local community, promotion of community participation in the design and administration of education services, and

decentralisation and improving teacher supervision through parental involvement. In the initiative, each school is administered by a community institution made up of parents and teachers elected every three years which has the authority to appoint and dismiss teachers, monitor teacher's performance, manage school funds and organise community meetings on how to improve school performance. As a result of the initiative, parents have become more devoted to their children's performance and teachers performed better and are more devoted to attending the general community meetings. This has led to an increase in accountability and co-responsibility in the education administration, overcoming the negative cycle of accountability absence during the implementation of primary education (Birdsall *et al.* 2005:119).

In India, to promote coordination, community ownership for better schools, known as the Movement for Alternatives and Youth Awareness (MAYA) was initiated in 1999 with aims to build and strengthen human institutions of the poor. Also referred to as a nongovernmental institution at the local community level in India, MAYA operates through village-level meetings to solve school problems on quality issues in 15,000 government schools in six districts in the state of Karnataka. MAYA works with students, parents, school committees, the education bureaucracy, and the state bureaucracy and provides a link between all the primary education stakeholders from the education administrators to the cultural leaders (Birdsall *et al.* 2005:126). The aim is incorporate culture and local communities in school governance while maintaining participation from the locals in the implementation of UPE irrespective of the culture and context of each community.

Uganda may not be able to replicate the experience of the selected countries with international best practices in general, in sense that each country selected, success in primary education is attributed to various institutional factors and historical backgrounds specific to that country. However, Uganda can replicate the successful policies and

programmes that these countries have put in place to promote free primary education. Among these are the following.

- a) MIITEP and SNED put in place to promote in-service training for teachers and motivation as represented in Malawi and Chile respectively;
- b) *Boletim da Escola* to increase awareness in Brazil;
- c) EDUCO to promote coordination through community partnership in El-Salvador; and
- d) MAYA to promote coordination through community ownership in India.

Given that most of the policies and programmes above represent critical factors in organising as a management function, for the successful implementation of UPE to prevail in an appropriate management framework focusing on planning and organising the Ministry of Education and Sports should try and adopt some of the above mentioned programmes.

4.6 TRENDS IN THE PLANNING AND ORGANISING FRAMEWORK OF UNIVERSAL PRIMARY EDUCATION IN MEXICO, BANGLADESH AND KENYA

This section will unfold the planning and organising trends in the management of UPE in Mexico, Bangladesh and Kenya.

4.6.1 National commitment and high public expenditure on education

Based on the historical backgrounds of Mexico, Bangladesh and Kenya, there is strong national commitment towards UPE expressed both through legal and institutional frameworks as well as through the budget allocation for primary education. In Bangladesh and Mexico, for instance, not only has primary education been recognised as free, it has

also been legalised as a basic right for all children. Furthermore, primary education is compulsory and should be provided by the government (Ardt *et al.* 2005:4; Santibanez *et al.* 2005:65). In terms of finance, all three of the countries allocate at least 50% of their national budget as a proportion of the Gross Domestic Product (GDP) to primary education with Mexico spending about 5.9% of its GDP on education, Kenya allocating 51% of the education budget to primary education on top of what is contributed annually by international donors such as the World Bank, Swedish International Development and the Canadian International Agency (Sifuna & Sawamura 2009:53).

Therefore based on the level of achievements in primary education in the above mentioned countries, a conclusion can be made that national commitment and high public expenditure contributes a great deal to the success of primary education. And for the successful implementation of UPE to prevail with in an appropriate management framework, mechanisms should be developed within the Ministry of Education and Sports to increase national commitment and public expenditure as will help solve planning challenges at national and district and school level caused by limited funds.

4.6.2 Community involvement in the implementation of Universal Primary Education

In all the selected countries, there is a significant form of community ownership with communities engaged in different activities to see to it that UPE is a success. In Mexico and Bangladesh, this can be observed in the government initiatives. In Mexico community involvement is increased through the PROGRESA (*Oportunidade*) Programme providing cash transfers to poor households in the most marginal rural areas, on condition that their children attend school. The BRAC, the largest non-governmental institution in Bangladesh, provides education to poor families in the rural hard to reach areas and the PEDP II Programme aims to improve the quality of education and equity of access. Through providing non-formal education and life skills education while creating

awareness of child labour issues, communities have been involved through the creation of school management committees comprising representatives from local communities, parents and teachers expected to back up head teachers in the general management of schools, identify priority areas for development, mobilize community support, and manage UPE funds (Sifuna *et al.* 2008: 43).

Clearly depicted in the trends above, community and civil society support and involvement are indispensable when it comes to local level planning and management, and building up an attractive and efficient primary education delivery system. However, based on the interviews conducted in chapter three, the study identifies a top-down approach with limited consultation amongst lower level stakeholders in the implementation and planning of UPE, an indication that there is limited community and civil society support and involvement when it comes to planning of UPE. Therefore for the successful implementation of UPE to prevail in an appropriate management framework focusing on planning, the Ministry of Education and Sports should encourage a bottom-up approach with all-inclusive consultation with stakeholders at the district and schools levels since they are at the grassroots and are more aware of the problems affecting schools and the needs of schools and the community.

In addition to the above, the study has also established the importance of a stronger partnership with NGOs towards providing quality education to the rural children and the empowerment of the local communities and partnerships as means to an end towards the success for the implementation of UPE. Therefore based on the findings for the successful implementation of UPE, the Ministry of Education and Sports should foster more partnerships with NGO's, SMC's and CCT's to take up some of the management roles and the role of the community and civil society should not be taken for granted by the Ministry of Education and Sports.

4.6.3 Institutional control

In three of the selected countries, institutional control is vested in the national governments in the ministries of education, school management committees and teachers' unions. In Bangladesh it is referred to as the Ministry of Primary and Mass Education under the leadership of the secretary of Government, followed by the directorate of primary Education along with the directorate, district education offices and the Upazilla education officers responsible for the overall planning, financing, policy formulation, evaluation, execution of plans, training and the initiation of legislative measures related to primary and non-formal education (Rabbi 2009:33).

In Mexico responsibility is vested in the *Secretaria de Education Pu'blica* (SEP) and the teachers' union (SNTE). It is the SEP's responsibility to guarantee the national unity of basic education, improve its quality, and seek equity in the access to these services. It also establishes that it is the states' obligation to provide initial and basic education, including indigenous and special education services, as well as teacher training programmes. It is through the SNTE that all major reforms and policies gain approval (Santibanez *et al.* 2005:65). In Kenya institutional control is vested in the Ministry of Education, Science and Technology (MoEST), district officials, head teachers and school management committees who are responsible for the planning, organising, finance and implementation of UPE in Kenya (Sifuna *et al.* 2008:43).

According to Rabbi (2009:32), the overall education management depends on the institutional structure and any changes will require considerable leadership and the management skills if reforms are to be implemented smoothly. Therefore based on the fact that interview responses in chapter three indicated that the management of UPE is still faced with challenges related to institutional control where by those in managerial

positions have no management skills whatsoever since they were just promoted from being teacher to head teacher and then district officials without any form of management training, for the successful implementation of UPE in an appropriate management framework to prevail institutional control should be clear and not taken for granted.

4.6.4 Institution

In all of the selected countries, primary education is organised in a decentralised manner where various stakeholders take part in the provision of UPE in these countries. That is to say, authority over implementation of UPE is delegated to national government, district and school level. In Mexico authority being divided between the federal, state and municipal government, Kenya between the national government, district and school management committee and in Bangladesh, between the national government, the division offices, the district and the *Upazilla*. Thus, indicating that success of UPE is also dependant on the institution structure amongst other factors *i.e.* maximum communication, coordination, finance and control. And for the successful implementation of UPE to prevail in an appropriate management framework focusing on planning and organising, the institution structure should not be taken for granted.

4.6.5 Enrolment as a result of food support

There is also strong emphasis on increasing enrolment in all the three countries which can be observed in these countries poverty eradication policy initiatives such as PROGRESA in Mexico, BRAC and FFE in Bangladesh and the food programme in Kenya that provides porridge to primary school children in impoverished areas. Thus, indicating that enrolment in primary education is critical for the success of primary education and as thus should not be taken for granted within the Ministry of Education and Sports for the successful implementation of UPE.

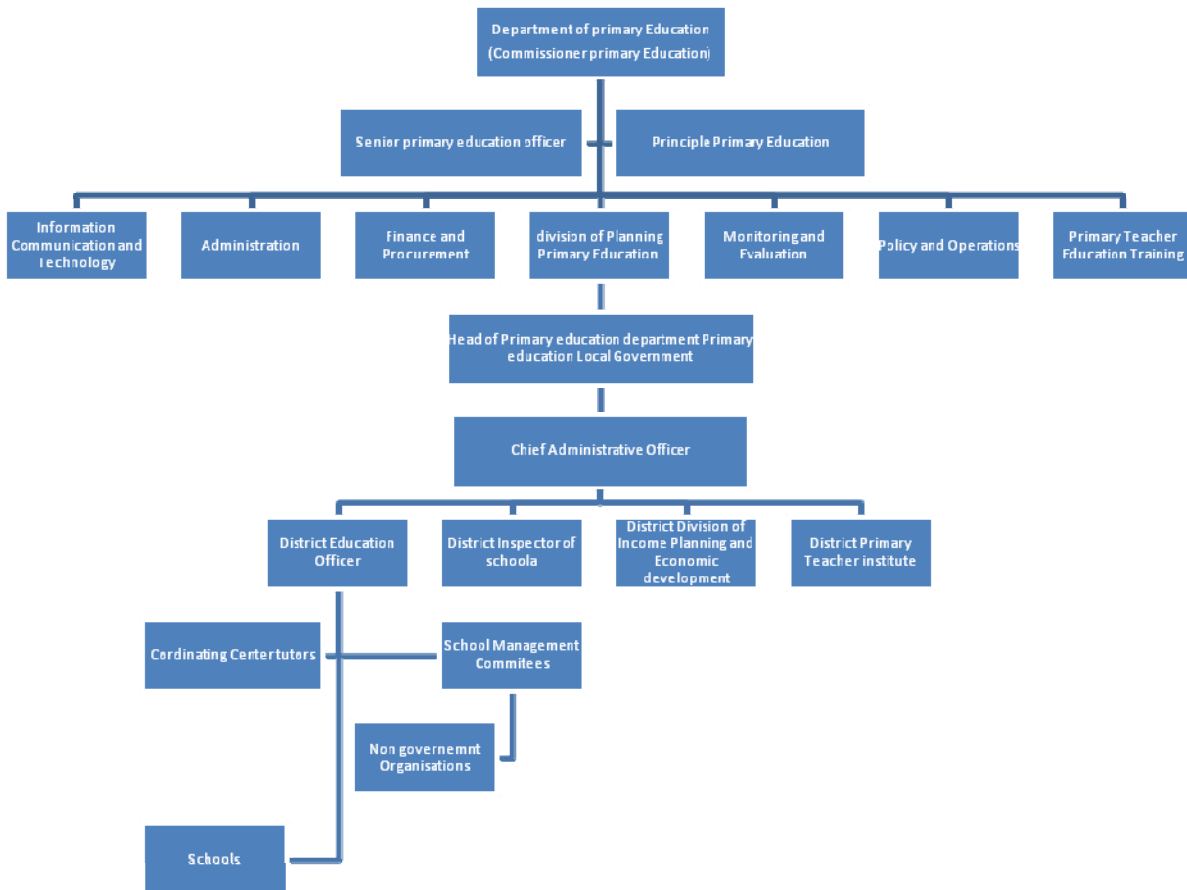
4.7 SUGGESTED INSTITUTIONAL FRAMEWORK AND RECOMMENDATIONS FOR THE IMPLEMENTATION OF UNIVERSAL PRIMARY EDUCATION IN UGANDA

Based on the challenges highlighted in chapter three, attaining UPE is not an easy task and government intention alone without proper planning, communication, coordination, stakeholders commitment, an appropriate institutional framework and financial resources make it an even harder task to accomplish. Therefore, with reference to institutional frameworks, experiences and best practices in terms of management from other developing countries like Mexico, Bangladesh, Kenya, Chile and Brazil to mention but a few this section will unfold a comprehensive institutional framework, and the planning and organising recommendations for the successful implementation of UPE.

4.7.1 Recommended comprehensive institutional framework for the implementation of Universal Primary Education

According to Fox, Schwella & Wissink (1991:72) for the organising function to be successful, the institutional structure must reflect objectives and plans, the powers of the leader, like any plan reflect the environment and must be efficient and effective (Fox *et al.* 1991:72). Therefore, for the effective implementation and streamlining of UPE whilst strengthening the infrastructure, the Ministry of Education and Sports should consider the comprehensive institutional framework represented in figure 4.1 below as opposed to the one represented in chapter two of this dissertation.

Figure 4.1: Comprehensive institutional structure for the implementation of UPE in Uganda



Organised in a decentralised manner, within the Ministry of Education and Sports should be an independent Department of Primary Education (DPE), headed by the Commissioner Primary Education comprising of seven divisions namely: Administration; Primary Teacher Education Training; Policy and Operations; Finance and Procurement;

Monitoring and Evaluation; Information Communication and Technology and; the division of Planning Primary Education. The responsibilities of this new structure include:

- a) the overall planning of primary education;
- b) formulation of policies, programmes and strategies for UPE;
- c) monitoring and evaluation of the implementation of UPE's strategic plan, policies and programmes; the impact of the UPE policy to the public and country development;
- d) help international donors assess the effectiveness of the policy and programmatic changes;
- e) coordinate activities among stakeholders and various funding agencies and provide clear aspect on areas that need to be changed;
- f) dissemination of information to all stakeholders;
- g) collect and translate all data in all the different languages, publish findings, and communicate to the public about the policies and objectives of UPE;
- h) mobilise resources for the implementation of UPE and the recommended appropriate research;
- i) create and strengthen partnerships for an expanded national response;
- j) set standards, provide curriculum, relevant guidelines and disseminate them;
- k) liaising with the district officials on the payment of teachers salaries;
- l) liaising with the division of finance planning and economic development at district level on the provision of UPE capitation grant;
- m) liaising with the district education office to come up with motivation facilities for teachers and district officers; and

n) training primary teachers.

The Division of Primary Education at local government acting as linkage between the national level and the district level, responsible for coordination, and liaising with the Information Communication and Technology division to ensure that all relevant information is effectively and efficiently disseminated to all stakeholders.

The District Primary Education Office guided by the Chief Administrative Officers, reporting to each is the District Education officer and District inspector of schools, responsible for taking decisions related to administration and supervision of all primary schools; overseeing the implementation of the UPE programme; sensitising stakeholders on UPE; interpretation of UPE programmes, policies and strategies; distribution of textbooks and teacher recruitment and posting. The Primary Teacher Institute should be responsible for the academic supervision of primary teachers; organising district officers training, research workshops and seminars in the field of management; organising subject based training for primary teachers and in-service training for primary teachers and head teachers. The District Finance and Planning Division headed by the District Finance Officer comprising of the district, the division, parents, Non-government institutions and School Management Committee representatives should be responsible for the drafting of the UPE budget and economic development; ensuring prompt disbursement of the UPE grant to schools and proper accountability; facilitate the District Education Officers' office; and collaborating with the divisions of planning, finance and procurement at the national level to formulate Indicative Planning Figures (IPFs).

The Division guided by senior education officers made up of SMC, Co-ordinating Centre Tutors (CCTs) and NGO's responsible for the management of schools; monitoring children's attendance; teachers performance; setting by-laws for the successful

implementation of UPE and enforcing the children's acts, assisting in tracing primary drop-outs so as to enable sustained continuity of UPE; and identifying the community priorities of a given social setting *i.e.* infrastructure, latrines, teachers and textbooks. The primary schools at the bottom of the structure made up of head teachers, teachers and students responsible for the management of schools, designing programmes that make schools interesting to the children, ensuring that teacher salaries are paid every month, sensitising and mobilising community and parents to send children to school and retain them there, implementation of UPE plans, programmes and strategies and the planning for and maintaining of high standards in areas of discipline, infrastructure and education materials, teaching and learning.

Based on the above argument, for the successful implementation and management of UPE, the following recommendation is in order.

Recommendation 1: it is recommended that the Ministry of Education and Sports adopts an independent Department of Primary Education (DPE), headed by the Commissioner Primary Education comprising of seven divisions namely: Administration; Primary Teacher Education Training; Policy and Operations; Finance and Procurement; Monitoring and Evaluation; Information Communication and Technology and; the division of Planning Primary Education as represented in figure 4.1.

4.7.2 Suggested recommendations for the planning and organising challenges in the implementation of Universal Primary Education

This section will unfold the recommendation to the communication, coordination and financial challenges faced during the implementation of UPE.

4.7.2.1 Communication

Communication occupies an innermost role in any institutional structure and is regarded as the binding factor for several disjointed activities of an executive institution into a meaningful whole. Referring to chapter two, it is clear that UPE in Uganda is decentralised with various stakeholders at both national, district and, school level playing a part. Thus, indicating the need for continuous communication among the various stakeholders for the effective and efficient management of UPE. Referring to the interview response in chapter two, such communication seems to be lacking among the various stakeholders since majority interviewed had negative perceptions towards UPE and some lacked the clear understanding of the policies, programmes, strategies put in place to support UPE.

Therefore based on the above discussion, for the successful implementation of UPE in an appropriate management framework focusing on planning and organising, the following recommendations are in order

Recommendation 2: it is recommended that for the Ministry of Education and Sports to improve its communication mechanisms so as to reach all the stakeholders it should develop a division of communication within the Ministry of Primary Education to provide information to all stakeholders, collect and translate all data in all the different languages, publish findings, and communicate to the public about the policies objectives of UPE.

Recommendation 3: it is recommended that in order to foster maximum communication at all levels of implementation for the effectiveness of the UPE policy, the Ministry of Education and Sports develops information campaigns on the delivery of services and resources from the national level to the district offices, the division and the schools.

Monitoring is a systematic collection and analysis of information aiming at improving efficiency and effectiveness of an institution based on the initial aims and objectives, while evaluation is an assessment of the institution progress against agreed strategic plans (Shapiro 2009:3). Acknowledged as a contributing element in communication, successful monitoring and evaluation leads to accountability, promotes greater rationality in public expenditure management and provides for a strong foundation for result-based management (Uganda Joint Assistance Strategy 2005: 34). Therefore for the implementation of UPE to be successful, it is crucial that monitoring and evaluation are not taken for granted within the Ministry of Education and Sports. Thus based on this argument, the following recommendation is in order.

Recommendation 4: it is recommended that the Ministry develops a Monitoring and Evaluation division to help monitor progress towards the achievement of the UPE aims and objectives, the impact of the UPE policy to the public and country development, assist international donors to assess the effectiveness of the policy and programmatic changes, coordinate activities among stakeholders and various funding agencies and provide clear guidance on areas that need to be changed.

4.7.2.2 Coordination

“Sustained improvements in education are impossible to achieve without improving both parental involvement in decisions affecting their children’s education and the way key institutions in the sector function. Whether parents and communities provide financial support, administrative support, or simply play an oversight role, local engagement, commitment, and support remains vital to ensuring that schooling is a priority for the community. Because the direct and opportunity costs of schooling and the real or perceived lack of economic returns diminish demand for education” (Levine et al 2005:67).

Referring to chapter three as represented in figure 3.2 and 3.3 respectively, stakeholders interviewed at district level, 58% indicated that they had a limited involvement in the planning process while the other 42% felt that they were not involved at all. While at school level, out of the 4 head teachers interviewed, the majority (75%) indicated that they had no involvement whatsoever in the planning process of the UPE initiatives. Thus, indicating that there is lack of coordination amongst the various stakeholders, limited participation of stakeholders and the use of a top-down approach in the management of UPE.

Therefore based on the above findings, the following recommendations are considered effective and in context with the challenge.

Recommendation 5: it is recommended that for the successful management and implementation of UPE to prevail in Uganda, the roles and responsibilities of district, division and school levels have to be strengthened and broadened to include involvement in the monitoring and evaluation, planning, devolved authority to act on behalf of the government for the benefit of the community, oversight and human resource development at school level.

Recommendation 6: it is recommended that the Ministry of Education and Sports encourages a bottom-up approach with all-inclusive consultation with stakeholders at the district and schools levels since they are at the grassroots and are more aware of the problems affecting schools and the needs of schools and the community.

Recommendation 7: it is recommended that the Ministry of Education and Sports fosters more partnerships with Nongovernmental Organisations (NGOs), School Management Committees (SMC's) and Co-ordinating Centre Tutors (CCTs) to take up some of the management roles.

4.7.2.3 Finance

Chapter three of this dissertation indicates that, financially, UPE in Uganda is restrained by inefficient financial management, fluctuation of the budget, outdated prolonged financial disbursement procedures and inadequate amounts of school finances to meet estimated expenditures. For instance, although development plans, policies are prepared by the Ministry of Education and Sports, approved by the overall Planning and Development Department, the Ministry of Education and Sports has to liaise with the Ministry of Finance and Economic Planning for provision of UPE capitation funds. The funds are then sent to the Bank of Uganda for processing and then forwarded to the regional commercial banks, thereafter to the District branches who forwards the funds to the CAO accounts who then credits the funds and forwards to the DEO and finally to schools. With all the actors involved in the distribution of the UPE funds which most of the time do not tally with the request from the district education officers, financial challenges are unavoidable.

Recommendation 8: for the successful implementation of UPE in an appropriate management framework focusing on planning and organising to prevail, it is recommended that obstacles be removed in disbursement of funds through creation of a division of finance planning and economic development at district level under the department of primary education to directly deal with the disbursement of UPE funds to schools from the national level.

Recommendation 9: it is also recommended that the ministry of Education and Sports ensures that the department of finance and planning within the ministry of Education and Spots provides realistic Indicative Planning Figures (figures representing the overall amount allocated to primary education in the national budget) to cater for all the requirements needed for the successful implementation of UPE. Due to the fact that financial resources are crucial to the overall functioning and efficiency if schools are to meet there initial plans, and districts are to fulfill their roles and responsibilities *i.e.* inspection of schools, organising briefings and seminars and monitoring and ensuring that UPE buildings and scholastic materials are evenly distributed to all district.

4.8 CONCLUSION

What this chapter reveals clearly is that quality management of UPE requires efficient and effective communication, adequate finances, and a comprehensive planning and institutional framework. As demonstrated in the international best practices by other countries, quality management of UPE is not impossible.

Attaining UPE is not an easy task and government initiatives alone without proper planning, communication, coordination, stakeholders' commitment and financial resources make it an even an harder task to accomplish. Therefore with reference to institutional frameworks, experience, best practices in terms of management from other developing countries like Mexico, Bangladesh, Kenya, Chile and Brazil for the successful implementation and management of UPE, the Ministry should consider adopting a new institutional framework that entails formation of an independent Department of Primary Education with own division of planning, information and technology, monitoring and evaluation, a division of finance planning and economic development at the district level and a linkage between the national level and district levels. The following chapter will discuss the summary, conclusions, and the recommendations.

CHAPTER 5: SUMMARY, CONCLUSION AND RECOMMENDATIONS

5.1 INTRODUCTION

In this paper an attempt has been made to establish the extent which UPE is implemented in an appropriate management framework focusing on planning and organising management functions. This chapter therefore provides a summary of the contents of each chapter in the study, conclusions on each research topic within the context of the objectives and the recommendations and possible solutions to the management challenges experienced whilst implementing UPE in Uganda.

5.2 SUMMARY

The study is divided into five chapters representing its main objectives in a comprehensive and systematic manner. Chapter one as the beginning chapter is the general introduction of the research topic comprising of the background on the study, the motivation, the problem statement, the research objectives, research methodology, instruments of data collection and the preliminary framework for the study.

Chapter two discussed the environmental framework within which the UPE policy in Uganda is implemented divided into the external and the internal environment. The external environment comprised of the political, technological and social environments and the external environment dealing with the motivation, the attitudes and the knowledge and skills of stakeholders. Interviews were used in this chapter to determine how the environment impacts on the implementation of UPE with specific emphasis on stakeholders' understanding of government initiatives enabling UPE, perception towards UPE and the level of motivation were all tested. An overall deduction was made that stakeholders at the school level have limited knowledge on the government initiatives enabling UPE, negative perception towards UPE attributed to lack of communication and there is a lack of motivation.

Chapter three critically defined and explained the planning and organising management functions, processes, principles and advantages with an aim of evaluating their importance in the implementation of UPE in Uganda. The planning and organising challenges experienced by the ministry of education in the implementation of UPE have also been outlined.

Chapter four discussed the gaps, trends and international best practices in the management of UPE based on three countries namely Mexico, Bangladesh and Kenya with examples from other countries like El-Salvador, Malawi, India and Brazil. Then presented a comprehensive framework in which UPE should be implemented and suggested recommendations for overcoming the planning and organising challenges faced by the Ministry of Education and Sports in overall management of UPE.

5.3 CONCLUSION

Comprising of the political, social and technological environments, either the external and internal environments in one way or another impact on the environment in which UPE is implemented. The external environment is crucial to the Ministry of Education and Sports as it highlights the needs and demands of the people, the institutional structure and legislation upon which the ministry bases its planning and organising function in the realization of its objectives to implement UPE.

The internal environment, although complex, provides insight to internal factors that would influence the motivation, perception and the knowledge of stakeholders in the implementation of UPE. The internal environment indicates the clear relationship between motivation, perception, knowledge and the stakeholders' performance. Therefore, given the nature of UPE, analysis of both the external and internal environments should not only

be regarded as means to an end in itself but a very critical starting point for the planning and organising function for the implementation of UPE.

Therefore in the light of the above mentioned elements of organising, communication plays an important part in the success of organisation especially decision making. For example it is only through adequate communication within the institution that information is transferred and processed correctly in a meaningful way implying that stakeholders must pay critical attention to both the quality of communication and the volume of information before making decisions. Given the diversity, language and the cultural differences in Uganda, for the implementation of Universal Primary Education to be successful, the Ministry of Education and Sports must emphasize the importance of communication in organising and also make sure that officials are proficient in the different languages involved.

From the company's strategy or plan organising follows suite after planning due to the fact that it is through organising that departments decide how to carry out day to day activities to fulfill the organisation's goals and objectives (Daft 2000:207). Irrespective of the fact that planning is the cornerstone for the other management functions, strategies will not be possible if there is a lack of systematic allocation of resources and people to execute the plans.

Key institutional reforms include delegation of authority and strengthening the management and administrative capacities at all levels of the organisational framework. In order for this to happen, it is imperative that the Ministry of Education and Sports adopts a motivation strategy to credit hard work from stakeholders through providing transport facilities, merit awards to basic schools based on results, bonuses, houses to

teachers and improve working conditions so as to attract more teachers to fill all existing vacancies.

According to Avensteup, Liang & Nelleman (2004:18) “*without commitment to carry out what is needed and the willingness to devote oneself to the task capacity, remains an objective*”. Given that head teachers and teachers play a pivotal role in both the implementation and management of UPE, the Ministry of Education and Sports in Uganda should focus on the training and provision of incentives in form of bonuses to teachers and head teachers in order to increase capacity, knowledge and skills while maintaining efficiency, quality and effectiveness in the management of UPE.

Uganda may not be able to replicate the experience of the selected countries with international best practices in general, in the sense that each country selected, success in primary education is attributed to various institutional factors and historical backgrounds specific to that country. However, Uganda can replicate the successful policies and programmes that these countries have put in place to promote free primary education. Among these are the following.

- a. MIITEP and SNED put in place to promote in-service training for teachers and motivation as represented in Malawi and Chile respectively;
- b. *Boletim da Escola* to increase awareness in Brazil;
- c. EDUCO to promote coordination through community partnership in El-Salvador; and
- d. MAYA to promote coordination through community ownership in India.

Given that most of the policies and programmes above represent critical factors in organising as management function, for the successful implementation of UPE to prevail in an appropriate management framework focusing on planning and organising the Ministry of Education and Sports should try and adopt some of the above mentioned programmes.

5.4 RECOMMENDATIONS

The previous chapters have identified and analysed the environment in which UPE evolves, the management framework for the implementation of UPE, including the international best practices for the management of UPE, initiatives and trends in other countries. And as a result the study established the importance of communication, coordination, motivation, finance and participation. As well as the advantages of a stronger partnership with NGOs towards providing quality education to the rural children and the empowerment of the local communities and partnerships as means to an end towards the success for the implementation of UPE. Therefore based on the findings, the following recommendations were considered to be convincing and effective for the successful implementation of UPE.

Recommendation 1: for successful implementation of UPE, it is recommended that the Ministry adopts an independent Department of Primary Education (DPE), headed by the Commissioner Primary Education comprising of seven divisions namely: Administration; Primary Teacher Education Training; Policy and Operations; Finance and Procurement; Monitoring and Evaluation; Information Communication and Technology and; the division of Planning Primary Education.

Recommendation 2: it is recommended that for the Ministry of Education and Sports to improve its communication mechanisms so as to reach all the stakeholders, it should develop a division of communication within the Ministry of Primary Education to provide information to all stakeholders, collect and translate all data in all the different languages, publish findings, and communicate to the public about the policies objectives of UPE.

Recommendation 3: it is recommended that in order to foster maximum communication at all levels of implementation for the effectiveness of the UPE policy, the Ministry of Education and Sports develops information campaigns on the delivery of services and resources from the national level to the district offices, the division and the schools.

Recommendation 4: it is recommended that the Ministry develops a Monitoring and Evaluation division to help monitor progress towards the achievement of the UPE aims and objectives, the impact of the UPE policy to the public and country development, assist international donors to assess the effectiveness of the policy and programmatic changes, coordinate activities among stakeholders and various funding agencies and provide clear guidance on areas that need to be changed.

Recommendation 5: it is recommended that for the successful management and implementation of UPE to prevail in Uganda, the roles and responsibilities of district, division and school levels have to be strengthened and broadened to include involvement in the monitoring and evaluation, planning, devolved authority to act on behalf of the government for the benefit of the community, oversight and human resource development at school level.

Recommendation 6: it is recommended that the Ministry of Education and Sports encourages a bottom-up approach with all-inclusive consultation with stakeholders at the district and schools levels since they are at the grassroots and are more aware of the problems affecting schools and the needs of schools and the community.

Recommendation 7: it is recommended that the Ministry of Education and Sports fosters more partnerships with NGOs, SMCs and CCTs to take up some of the management roles.

Recommendation 8: for the successful implementation of UPE in an appropriate management framework focusing on planning and organising to prevail, It is recommended that obstacles be removed in disbursement of funds through creation of a division of finance planning and economic development at district level under the

department of primary education to directly deal with the disbursement of UPE funds to schools from the national level.

Recommendation 9: it is also recommended that the ministry of Education and Sports ensures that the department of finance and planning within the ministry of Education and Sports provides realistic Indicative Planning Figures (figures representing the overall amount allocated to primary education in the national budget) to cater for all the requirements needed for the successful implementation of UPE. Due to the fact that financial resources are crucial to the overall functioning and efficiency, if schools are to meet their initial plans, and districts are to fulfill their roles and responsibilities *i.e.* inspection of schools, organising briefings and seminars and monitoring and ensuring that UPE buildings and scholastic materials are evenly distributed to all district.

5.5 CONCLUDING REMARKS

Regardless of UPEs' good intentions, the top down policy implementation approach still undermines the policy by overlooking district, school and community stakeholders' perceptions and attitudes that are likely to determine the policy outcome. District, community and civil society support and involvement are indispensable when it comes to local level planning and management, and building up an attractive and efficient primary education delivery system. Therefore for the successful implementation of UPE to prevail in an appropriate management framework focusing on planning and organising, the role of the community and civil society should not be taken for granted by the Ministry of Education and Sports.

Planning which remains satisfied with reactive, survival responses to difficult and crisis situations may seem to be making the necessary minimum adjustments. It may seem to be in placing the education system on the road to stability. But as long as the present inroads of lack of motivation, negative perceptions and lack of stakeholders' knowledge

on the government initiatives persist, such an education system will remain at risk and in danger. Without planning, organising would be disorganised, extremely difficult to lead subordinates and explain the future of the organisation. Therefore considering the aims and objectives of UPE, the organisational structure and the various stakeholders involved, there will be need for efficient and effective planning and organising to ensure qualitative and efficient implementation of UPE is brought close to all children of school going age in Uganda. This however does not mean that other factors should be disposed off and that just the shallow understanding of planning and organising without going into details and putting into practice is enough to ensure the success of UPE.

Attaining UPE is not an easy task and government initiatives alone without proper planning, communication, coordination, stakeholders commitment and financial resources makes it an even harder task to accomplish. Therefore with reference to organisational frameworks, experience, best practices in terms of management from other developing countries like district level and a linkage between the national level and district Mexico, Bangladesh, Kenya, Chile and Brazil for the successful implementation and management of UPE the ministry should consider adopting a new organisational framework that entails formation of an independent Department of Primary Education with own division of planning, information and technology, monitoring and evaluation, a division of finance planning and economic development at the levels.

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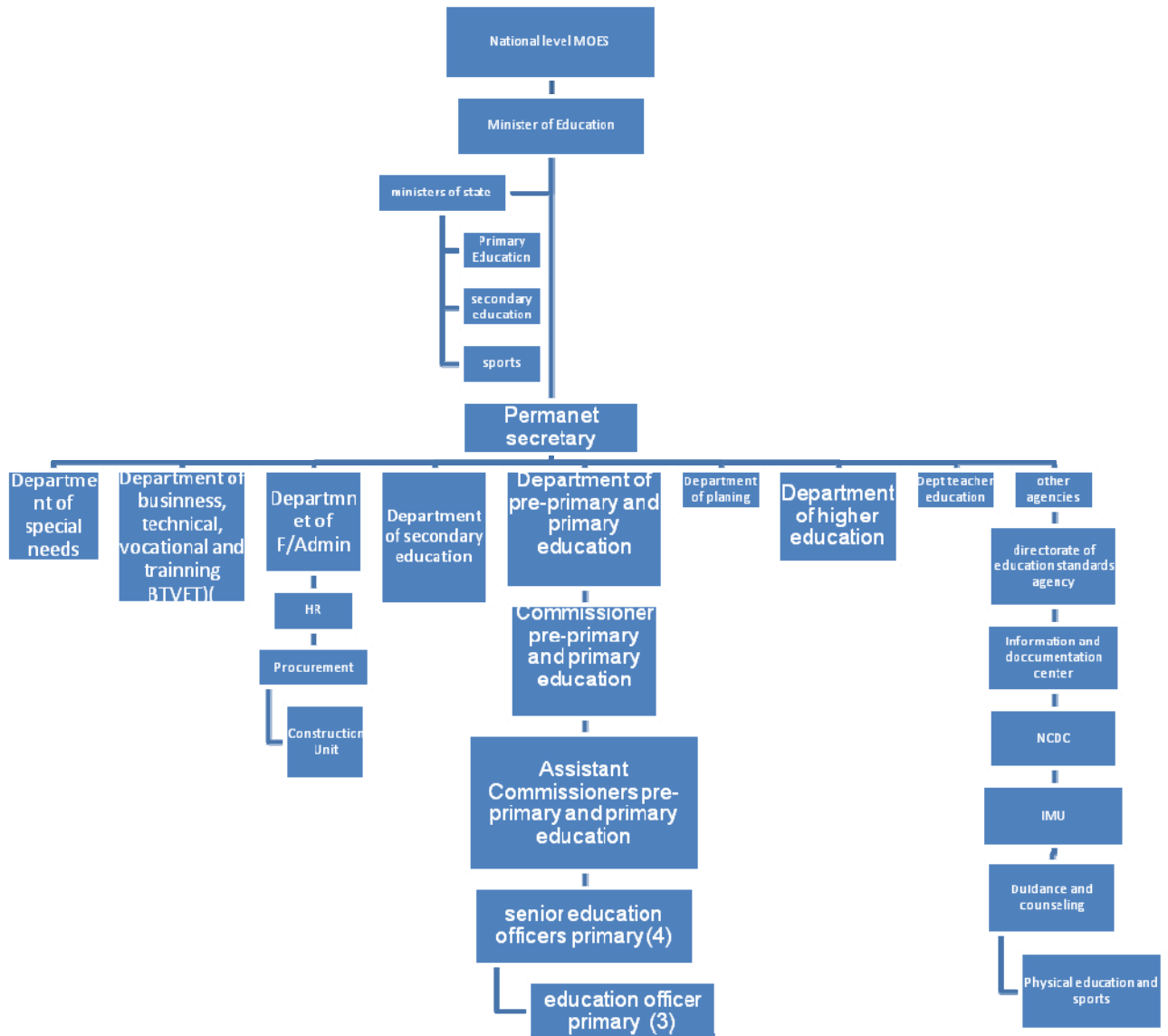
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ANNEXURE A:

Figure 2.1: The structure of the Ministry of Education and Sports.



ANNEXURE B:

Interview Schedule

Interview Questions (National level)

Date:

Commissioner:

1. What constitutes the Universal Primary Education policy framework?
2. What do you perceive as your role in enabling Universal Primary Education?
3. Who are the Stakeholders in Universal Primary Education?
4. What are the roles and responsibilities of the stakeholders and why were these roles assigned to them?
5. What does Universal Primary Education intend to achieve?
6. What are the plans, strategies, and programmes put in place to enable the management of Universal Primary Education?
7. According to the guidelines on policy, roles and responsibilities of stakeholders in the implementation of Universal Primary Education, the Ministry of Education and Sports is responsible for providing and developing policies and policy guidelines on education: How do you go about that?
 - a. Who is involved in providing and developing these policies and policy guidelines for Universal Primary Education?
 - b. How often are these policies and policy guidelines for Universal Primary Education revised?
 - c. How are these policies and policy guidelines for Universal Primary Education communicated to all the stakeholders?
8. Still referring to the guidelines on policy, roles and responsibilities of stakeholders in the implementation of Universal Primary Education, the Ministry of Education and Sports is responsible for supervising, monitoring and evaluating the

- implementation programme of government education policies: How do you go about that?
- a. What methods are involved in the supervising, monitoring and evaluating of Universal Primary Education?
 - b. How often are the supervising, monitoring and evaluating functions for Universal Primary Education conducted?
9. How is Universal Primary Education resourced in terms of?
- a. Finance
 - b. Deployment and training of teachers
 - c. Instructional materials
 - d. Running the costs at district level
10. What is the criterion for the allocation of these resources?
11. Does this criterion for the allocation of funds prove to be effective in terms of the implementation of Universal Primary Education?
12. What are the structures/ mechanisms put in place to facilitate coordination?
13. What are the planning challenges that you face in the implementation of Universal Primary Education?
14. What are the communication challenges that you face in the implementation of Universal Primary Education?
15. What are the coordination challenges that you face in the implementation of Universal Primary Education?
16. How would you describe the Ministry of Education's attempts towards motivation of stakeholders in the implementation of UPE?
17. Based on your judgment, how effective are these motivational mechanisms towards stakeholders in the implementation of UPE?
18. In your opinion, is knowledge, skills and attitudes of stakeholders at district and school level sufficient for the successful implementation of UPE?

Interview questions for District Officials

Date:

Name of the District:

District official:

1. What constitutes the Universal Primary Education policy framework?
2. What do you perceive your role to be in enabling the Universal Primary Education policy framework?
3. Who are the Stakeholders in Universal Primary Education?
4. With all the different stakeholders at district level, when and how do you get together?
5. Are you aware of the plans, strategies, programmes and policies enabling Universal Primary Education? Elaborate
6. What is your involvement in the formulation of these plans, strategies, programmes and policies?
7. What is your perception towards these plans, strategies programmes, and policies enabling Universal Primary Education?
8. How have these plans, strategies, programmes and policies been communicated down to school level?
9. How do you decide the annual budget for primary education at district level?
10. What are the challenges that you face in Primary Education finance in your district?
11. What are the communication challenges that you face during the implementation of Universal Primary Education?

12. What are the coordination challenges that you face during the implementation of Universal Primary Education?
13. In your opinion, what does Universal Primary Education intend to achieve?
14. How would you describe the Ministry of Education's attempts towards motivating you as a stakeholder in the implementation of UPE?
15. Based on your judgement, how effective is their motivation?
16. In your opinion, are the knowledge, skills and attitudes of stakeholders at national and school level sufficient for the successful implementation of UPE?

Interview Questions for Head Teachers

Date:

Name of the District:

Name of the school:

1. What constitutes the Universal Primary Education policy framework?
2. What do you perceive your role to be in enabling the Universal Primary Education policy framework?
3. What are the plans, strategies, programmes and policies enabling Universal Primary Education?
4. What is your perception towards these plans, strategies, programmes, and policies enabling Universal Primary Education? What does Universal Primary Education intend to achieve?
5. What is your involvement in the formulation of these plans, strategies, programmes and policies enabling Universal Primary Education?
6. According to the guidelines on policy, roles and responsibilities of stakeholders in the implementation of Universal Primary Education, Head teachers are responsible

for designing programmes that make the school interesting to the children in order to keep them in school: How do you go about this?

- a. How are these programmes communicated to the stakeholders at national and district level?
 - b. What are the challenges that you face while designing these programmes?
7. What are the sources of income at your school with regards to the implementation of Universal Primary Education?
 8. What are the financial challenges that you face during the implementation of Universal Primary Education?
 9. What challenges in planning do you experience at school level in the implementation of Universal Primary Education?
 10. What are the communication challenges that you face in the implementation of UPE?
 11. What are the coordination challenges that you face in the implementation of UPE?
 12. How would you describe the Ministry of Education's attempts at motivating you as a stakeholder in the implementation of Universal Primary Education?
 13. Based on your judgement, how effective is their motivation in your implementation of Universal Primary Education?
 14. In your opinion, are the knowledge, skills and attitudes of stakeholders at national and district level sufficient for the successful implementation of UPE?

Thank you for your cooperation