



School Head Teachers' Experience in Managing Free Education Grants in Public Secondary Schools in Senga Hill District

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Abstract- The introduction of Free Education Grants (FEGs) in Zambia in 2022 marked a major policy shift aimed at reducing barriers to access and improving the quality of education in public schools. However, the effectiveness of the policy largely depends on how grants are managed at the school level. This study explored the experiences of head teachers in managing Free Education Grants in public secondary schools in Senga Hill District. This study consisted of 70 participants drawn from the public secondary schools of Senga Hill District, comprising 10 head teachers, 5 deputy head teachers, and 55 classroom teachers. Findings revealed that while Free Education Grants have significantly improved access and eased the financial burden on parents, their management poses critical challenges. Key issues identified include delays in disbursement, inadequate financial management skills among administrators, weak monitoring and accountability structures, and insufficient training in grant utilization. Head teachers reported increased administrative workload, which at times conflicted with their instructional leadership roles. Despite these constraints, strategies such as community involvement, transparent record keeping, and improvisation in resource allocation were employed to mitigate challenges. The perceived impact of grants was largely positive in terms of improving school operations and access, though limitations in infrastructure development and quality enhancement were evident. The study recommends capacity-building programs for head teachers in financial management, timely and predictable release of grants, and strengthening participatory governance structures to enhance transparency and accountability. It further suggests that policymakers provide digital financial management tools and conduct regular audits to ensure effective utilization of funds. These measures would not only improve the sustainability of Free Education Grants but also reinforce their intended impact on educational equity and quality.

Keywords: Free Education Grants, financial management, head teachers, Senga Hill District, Zambia

I. Introduction

1. Background of the Study

Background of the Study

Education is universally recognized as a fundamental human right and a cornerstone for socio-economic development, with its importance underscored by a series of international declarations and frameworks. The Universal Declaration of Human Rights of 1948 first established the right to education, a principle that has been consistently reinforced over the decades. Subsequent global initiatives, such as the Education for All (EFA) initiative of 1990 and the Sustainable Development Goals (SDGs), particularly SDG 4, have further reinforced the international community's commitment to ensuring inclusive and equitable quality education for all (UNESCO, 2015). This global consensus has spurred governments worldwide to adopt policies aimed at dismantling financial barriers to schooling, with free education policies becoming a



primary strategy. These policies are premised on the belief that a child's access to schooling should not be contingent on their family's ability to pay.

In developed countries, the concept of free education has been a long-standing fixture within comprehensive social welfare systems. Countries in the Nordic region, such as Finland, Sweden, and Norway, exemplify this model by providing a fully-funded education system that extends far beyond tuition. Their policies cover instructional materials, and in many cases, also include free meals and transportation for students. This approach is rooted in the philosophy that education is a public good, essential for fostering social equality, innovation, and long-term economic competitiveness (OECD, 2019). The success of these systems provides a blueprint for how unwavering state commitment, combined with robust financing and effective school-level management, can create a sustainable and high-quality free education system.

The experiences of developing countries in implementing free education, however, present a more complex picture, highlighting both the opportunities and significant challenges. In Asia and Latin America, for instance, governments have leveraged school-based grants and capitation funding to expand access and alleviate the financial burden on households. These policies have been instrumental in boosting enrollment rates, but they have also placed a heavy administrative load on school leaders. Administrators are often tasked with the complex responsibilities of managing grant funds, ensuring strict accountability, and verifying that the funds are used directly for the benefit of students (Bruns, Filmer, & Patrinos, 2011).

Brazil's Fund for the Maintenance and Development of Basic Education (FUNDEB) provides a key case study in grant-based financing. This system distributes funds to states and municipalities with the goal of ensuring equitable resourcing across all schools, from impoverished rural areas to more affluent urban centers. While the model is conceptually sound, research has shown that without strong oversight and robust accountability mechanisms, significant disparities in resource allocation can persist. School administrators often struggle with the technical aspects of monitoring and reporting on resource utilization, underscoring that administrative capacity is just as crucial as the grant provision itself (Crouch & DeStefano, 2017).

Similarly, India's Sarva Shiksha Abhiyan (SSA) program allocated grants to schools for improving infrastructure, purchasing learning materials, and supporting teacher development. However, a study by De, Sharma, and Singh (2011) revealed that a significant challenge was the lack of training for school leaders in financial management. Many school administrators found themselves unprepared to handle the intricacies of budgeting, reporting, and aligning expenditures with specific educational priorities. This limited the overall impact of the grants, as funds were not always allocated strategically to address the most pressing needs.

Indonesia's Bantuan Operasional Sekolah (BOS) program further illustrates this point. By providing block grants directly to schools to cover operational costs, the program successfully enhanced school autonomy and reduced dependency on parent contributions. Yet, Chen (2011) found that administrators frequently struggled with financial record-keeping and with involving communities in decision-making



processes. This points to a broader global lesson: the effectiveness of free education financing is maximized when it is coupled with comprehensive capacity building for school administrators and the establishment of transparent, participatory governance structures.

In Africa, the push for free education gained significant momentum in the 1990s and 2000s, largely driven by the Millennium Development Goals (MDGs) and initiatives backed by international donors. Many countries in Sub-Saharan Africa abolished school fees to expand access and work towards achieving universal primary education. While these reforms successfully led to a dramatic increase in enrollment, they also laid bare the systemic weaknesses in financing and administrative capabilities, particularly at the school level (World Bank, 2016). The rapid surge in student numbers often outpaced the available resources, creating immense pressure on an already strained system.

Uganda's Universal Primary Education (UPE) program, launched in 1997, is a prime example of these challenges. It abolished tuition fees and introduced capitation grants to schools. However, a seminal study by Reinikka and Svensson (2004) exposed that a significant portion of the allocated funds never reached the schools due to leakages, corruption, and a weak monitoring framework. School administrators reported that the unpredictable and often insufficient disbursement of funds severely constrained their ability to plan and execute educational activities effectively. The lack of training in financial management further compounded these issues, leading to inefficient resource use.

Kenya followed a similar path with its Free Primary Education policy in 2003, which was supported by grants to schools for instructional materials and other costs. Research by Ngware, Oketch, and Ezech (2006) revealed that while the policy boosted enrollment, head teachers were suddenly burdened with complex administrative responsibilities. Without adequate training in financial management, many struggled with these new duties. The problem was exacerbated by delays in fund disbursement and limited oversight from higher authorities, which often meant that schools could not align their expenditures with their most critical educational needs.

Tanzania's education reforms in 2001, which provided school capitation grants to cover non- salary expenditures, faced similar issues. Al-Samarrai and Zaman (2007) noted that while the grants improved access, their effectiveness was undermined by challenges such as inadequate allocations, late disbursements, and weak accountability mechanisms. School administrators were forced to navigate a tightrope, balancing competing demands with insufficient and often delayed resources. This recurring pattern across African nations highlights the fundamental tension between ambitious policy goals and the operational realities on the ground.

In Malawi, the abolition of school fees in 1994 resulted in a massive influx of students. However, this surge occurred without a corresponding increase in resources. Chimombo (2009) observed that schools became severely overcrowded, and administrators were ill-equipped to handle the resulting shortages of materials and infrastructure. The subsequent grant financing was often insufficient and poorly



managed, with head teachers consistently citing a lack of training and proper monitoring as major obstacles. These cases underscore a crucial lesson: free education policies can significantly expand access, but their sustainability and effectiveness are critically dependent on how funds are managed at the school level.

These African experiences illustrate a recurring and powerful theme: while free education policies are vital for expanding access, their success hinges on the capacity of school-level administrators. Head teachers, in particular, are placed at the frontline of financial management, yet they often lack the formal training, support, and institutional oversight required to handle these responsibilities effectively (Bold et al., 2011). Without targeted capacity building, the administrative burden can detract from their primary role of providing instructional leadership and improving learning outcomes.

Zambia's educational landscape has similarly evolved in response to both global and regional reforms, reflecting a long-standing commitment to education as a tool for national development. At independence in 1964, the country's education system was designed to expand access and address the colonial legacy of inequality, with education being declared a priority sector (Kelly, 1999). However, over the decades, economic challenges, rapid population growth, and fiscal constraints have consistently undermined these ambitions, leading to a period of policy shifts aimed at addressing resource shortages.

In the 1990s, facing mounting economic pressure, Zambia introduced cost-sharing measures. This policy required households to contribute to education financing through various fees and levies. While this move provided some fiscal relief to the government, it created significant financial barriers for poor families, leading to increased inequality in access to education (Kapambwe, 2010). This period highlighted the inherent trade-off between fiscal sustainability and social equity, prompting a re-evaluation of the country's education financing model in the new millennium.

In 2002, in line with the global Education for All (EFA) and MDG agendas, the Zambian government made a major policy shift by officially abolishing school fees at the primary level. This was a significant milestone, leading to an immediate surge in enrollment (UNESCO, 2015). However, as seen in other African countries, this reform also exposed a range of systemic weaknesses, including severe shortages of classrooms, teachers, and essential learning materials. To support the policy, the government introduced grants to schools, but their effectiveness was often undermined by disbursement delays and inadequate allocations that could not keep pace with the dramatic increase in student numbers (MoE, 2016).

The most recent and sweeping reform came in 2022, when the government announced a new free education policy that eliminated tuition and examination fees across both primary and secondary schools. This policy marked a historic shift, placing the entire responsibility for financing non-salary operational costs on Free Education Grants (FEGs) disbursed by the Ministry of Education. This move was a clear statement of intent to enhance equity and ensure that financial constraints would no longer prevent any learner from accessing education at all levels (Government of Zambia, 2022).



The Free Education Grants (FEGs) were meticulously designed to cover a broad range of school operational needs, including instructional materials, infrastructure maintenance, and essential administrative expenses. The policy framework dictates that head teachers, supported by School Management Committees (SMCs) and local education boards, are responsible for managing these funds. The intention was to decentralize financial management and empower schools to make decisions that best serve their local needs.

Despite these laudable intentions, the practical rollout of the 2022 free education policy has faced significant challenges. Reports from various sources indicate that schools often experience delays in the disbursement of grants, which makes it incredibly difficult for administrators to plan and implement educational activities effectively (Times of Zambia, 2022). This unpredictability leaves schools in a perpetual state of uncertainty, unable to budget for essential needs such as learning materials, repairs, and utilities in a timely manner.

A critical issue that has emerged is the inadequate allocation of funds. Many head teachers have reported that the grants they receive do not correspond with the rapid rise in enrollment numbers. This disparity leaves schools with insufficient resources to meet the operational needs of a much larger student population, forcing administrators to make difficult choices and often leaving critical needs unmet. The gap between policy ambition and operational reality is a major source of frustration at the school level.

The financial management of Free Education Grants has become a central point of concern. Head teachers, who are the primary custodians of these funds, frequently lack formal training in accounting and financial reporting (Simukonda, 2018). This absence of capacity creates a high risk of misappropriation, errors in reporting, and significant inefficiencies in resource allocation. Without adequate capacity building, the administrative burden of managing grants can easily overwhelm school leaders, diverting their attention from their crucial instructional leadership roles.

Transparency and accountability have been further identified as key areas of weakness. While the Ministry of Education's guidelines require schools to report on how they utilize the grants, compliance is inconsistent. Cases of mismanagement and weak oversight mechanisms have raised serious questions about whether the funds are being used effectively to improve teaching and learning outcomes (MoE, 2016). This mirrors the systemic challenges observed in other Sub-Saharan African countries, suggesting that without a robust accountability framework, free education grants can fall short of their intended impact.

The role of community participation, a cornerstone of effective accountability, has not been fully realized within Zambia's FEG system. Although School Management Committees (SMCs) are meant to oversee financial management, their involvement is often limited by a lack of capacity, awareness, or resources. This disproportionate responsibility falls squarely on the head teachers, which increases the risks of poor decision-making and limits transparency (Osei, Dzimir, & Acheampong, 2009). For a truly participatory model to work, communities need to be empowered with the knowledge and tools to effectively hold school leaders accountable.



The unpredictability of grant disbursements is another major challenge that undermines operational efficiency. Schools depend on the timely receipt of funds to plan and implement educational activities throughout the school year. However, delays and irregularities in the funding cycles make it nearly impossible for administrators to budget for essential needs. This forces schools to operate in a reactive mode, often leading to temporary shortages of critical supplies and a compromised learning environment (Chanda, 2014).

The 2022 policy change has also greatly increased the administrative workload for head teachers. They now have to balance their instructional leadership duties their core role of improving teaching and learning with the demanding tasks of financial management. Many school leaders have expressed concern that, without additional support and a reduction in administrative bureaucracy, this increased burden will inevitably undermine their ability to focus on educational quality (Simukonda, 2018).

Despite these formidable challenges, the Free Education Grant (FEG) system remains central to Zambia's ambitious efforts to achieve equitable access and high-quality education for all its citizens. Policymakers and international partners like the World Bank argue that with improved training, rigorous monitoring, and enhanced community involvement, these grants can play a transformative role in improving school operations, upgrading infrastructure, and ultimately boosting learning outcomes (World Bank, 2018). However, the success of the policy is inextricably linked to addressing the persistent financial management challenges faced by school administrators.

The experiences of Zambian head teachers in managing these grants therefore offer a crucial lens for understanding the policy's effectiveness. Their perspectives provide valuable, on-the-ground insights into the practical realities of administering funds, including the challenges of financial capacity, accountability, and operational constraints. These lived experiences also shed light on the innovative strategies head teachers employ to overcome these difficulties, from creative budgeting practices to leveraging community engagement in new ways.

The evolution of Zambia's education system toward free education mirrors both global trends and the nation's own deeply held aspirations for equity and development. While the policy represents a monumental step forward, the effective management of Free Education Grants is a complex issue that requires a deeper empirical investigation. Understanding the experiences of school head teachers in districts such as Senga Hill is not just an academic exercise; it is essential for strengthening grant management, ensuring transparency, and ultimately, realizing the full transformative potential of the free education policy. It's against this background that this study seeks to examine school head teachers' experience in managing free education grants in public secondary schools in Senga Hill District

1. Statement of the Problem

Despite the government's commitment to free education and the disbursement of FEGs, there is a growing concern regarding the practical implementation and management of these funds at the school level. The transition from a parent-supported fee system to a government grant system has introduced new operational challenges for head teachers. Anecdotal evidence and preliminary observations suggest that head teachers in rural



areas face significant hurdles, including bureaucratic delays in fund disbursement, which disrupt planned school activities and operations. Furthermore, the amount of the grant is often cited as inadequate to cover the full spectrum of school needs, such as the maintenance of dilapidated infrastructure and the purchase of essential instructional materials, especially with increased student enrolment (Katongo, 2019).

The complexity of financial reporting and a lack of specific training for head teachers in grant management also pose a considerable challenge, potentially leading to misuse or inefficient allocation of funds (Banda & Phiri, 2022). These issues could ultimately undermine the policy's core objectives, leading to resource gaps and a compromised quality of education. While previous studies have examined educational financing policies in urban contexts (Phiri & Banda, 2022), there is a significant gap in the literature concerning the specific experiences of head teachers in remote, rural districts like Senga Hill. Therefore, this study seeks to examine school head teachers' experience in managing free education grants in public secondary schools in Senga Hill District

2. Purpose of the Study

The main purpose of this study is to explore and understand the lived experiences of school head teachers in managing Free Education Grants in public secondary schools in Senga Hill District.

3. Research Objectives

The specific objectives of the study are to:

- To identify the challenges faced by school head teachers in managing Free Education Grants in public secondary schools in Senga Hill District.
- To explore the strategies adopted by head teachers to mitigate the challenges and ensure the effective and transparent utilisation of the grants.
- To assess the perceived impact of the Free Education Grants on school operations, infrastructure development, and the overall quality of education.
- To propose practical and context-specific recommendations for policymakers and educational administrators to enhance the management and sustainability of Free Education Grants.

4. Research Questions

The study seeks to answer the following questions:

- What are the key financial and administrative challenges faced by school head teachers in managing the Free Education Grant in Senga Hill District?
- What innovative or traditional strategies have head teachers implemented to ensure the effective and timely utilisation of the grants, despite the challenges?
- How do head teachers perceive the impact of the Free Education Grants on student enrolment, resource availability, and overall educational standards in their schools?
- What recommendations can be made to policymakers and the Ministry of Education to improve the disbursement process and management of Free Education Grants for long-term educational development?

5. Significance of the Study

This study holds significant value for multiple stakeholders. Firstly, the findings will provide policymakers and the Ministry of Education with crucial empirical evidence on the on-the-ground realities of managing the Free Education Grant in a rural context.



This information can inform future policy adjustments, particularly concerning fund disbursement schedules and the grant amount per student. Secondly, this research will be a valuable resource for other school head teachers and administrators, offering insights into effective strategies for managing grants in challenging environments. The study will also help in identifying the specific training needs of head teachers in financial management. Finally, the academic community will benefit from this study as it contributes to the body of knowledge on educational financing and management in developing countries, specifically filling a notable research gap regarding rural districts in Zambia.

6. Scope of the Study

The study is geographically delimited to Senga Hill District in Zambia. Its focus is strictly on the experiences of head teachers in public secondary schools concerning the management of the Free Education Grant. The research employs a mixed methods approach, using semi-structured interviews as the primary data collection tool to gather rich, in-depth information. The study period covers the implementation of the free education policy from 2022 to the present, focusing on the lived experiences of head teachers during this period.

7. Limitations of the Study

The study is limited by its qualitative design, which, while allowing for a deep exploration of experiences, means the findings may not be statistically generalizable to all public secondary schools across Zambia. The sample size is intentionally small to facilitate in-depth interviews, further limiting generalizability. Furthermore, the reliance on self-reported data from interview participants may be subject to social desirability bias, where participants might provide responses they believe are more professionally acceptable rather than fully candid. These limitations will be acknowledged in the final report, and the findings will be interpreted with these constraints in mind.

8. Theoretical Framework

The study is guided by two main theoretical frameworks:

Social Role Theory

Social Role Theory, as articulated by Eagly and Wood (1991), posits that individuals' behaviors are influenced by the expectations and norms associated with their social roles. In this research, the school head teacher's role is a central point of analysis. The theory suggests that the responsibilities inherent in their role such as leading the school and managing its finances—shape their experiences and strategies when dealing with the FEG. This framework is useful for understanding how the demands of the head teacher role influence their decision-making, resilience, and adaptability in navigating the complexities of the new grant system.

Feminist Theory

Feminist theory provides a critical lens to examine power dynamics and social structures (Hooks, 1984). While not directly related to gender, this theory can be applied to analyze the power imbalances within the educational system, specifically the relationship between the central government (as the grantor) and the local school (as



the recipient). It helps to explore how a top-down policy might create or reinforce power imbalances, leading to a sense of disempowerment among head teachers who may feel they have limited autonomy in managing funds. This framework can also be used to explore how different administrators—based on factors such as gender, experience, or seniority might navigate the challenges of grant management differently due to their position within the hierarchical structure.

9. Conceptual Framework

The conceptual framework for this study illustrates the relationship between the key variables. The Free Education Grant (FEG) is the independent variable, representing the primary input into the school's financial system. The head teachers' experiences in managing the grant serve as the intervening variable, encompassing their challenges, strategies, and perceptions. The dependent variables are the outcomes of this management process, including the efficiency of school operations, the state of infrastructure, and the quality of education. This framework posits that the effectiveness of the FEG is not determined by the grant itself, but rather by the head teacher's ability to navigate the complexities of its management, which in turn influences the ultimate educational outcomes.

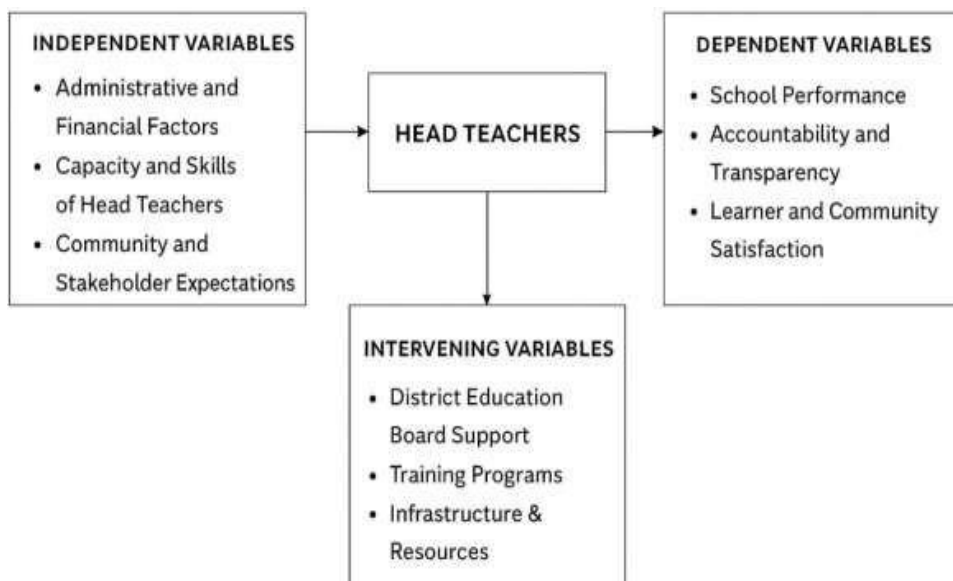


Figure 1: Conceptual Framework

A conceptual framework provides the guiding lens through which a study is interpreted, linking the independent, intervening, and dependent variables in a structured way. In this study, the head teachers are positioned at the center of the framework as the main agents of school management and administration of Free Education Grants. Their effectiveness depends on a range of independent variables, which are mediated by intervening factors, ultimately shaping the outcomes reflected in the dependent variables.



The first category of variables influencing head teachers is the independent variables, which consist of administrative and financial factors, the capacity and skills of head teachers, and community and stakeholder expectations. Administrative and financial factors play a decisive role in the management of Free Education Grants, since school leaders operate within a highly regulated environment shaped by government policies and financial regulations. Efficient administrative procedures and clear financial guidelines empower head teachers to allocate resources effectively, whereas bureaucratic delays and rigid systems may lead to inefficiencies and mismanagement (Bush, 2020).

Closely linked to this is the capacity and skills of head teachers. The effectiveness of school leadership depends not only on academic qualifications but also on practical skills in financial management, budgeting, leadership, and accountability. According to Leithwood and Jantzi (2006), the leadership practices of school heads are among the most critical factors influencing school performance. Head teachers who lack financial and managerial skills may find it difficult to manage grants transparently, thereby affecting accountability and community trust. On the other hand, those equipped with strong leadership capacity are able to make sound financial decisions, motivate teachers, and ensure that resources are directed toward improving learning outcomes. Another significant independent variable is community and stakeholder expectations. Schools operate within communities that hold expectations regarding transparency, accountability, and the quality of education delivered. The Free Education policy, in particular, has heightened public expectations that school funds should be effectively utilized to benefit learners and improve facilities. As argued by Epstein (2018), effective stakeholder engagement fosters trust, but when schools fail to meet expectations, dissatisfaction and conflict may arise. For head teachers, balancing limited resources with the demands of parents, learners, and education authorities becomes a critical leadership challenge.

The influence of these independent variables is mediated by a set of intervening variables, which include district education board support, training programs, and the availability of infrastructure and resources. Support from district education boards provides oversight, monitoring, and guidance, which are necessary to ensure consistency and accountability in financial management. As noted by Darling-Hammond (2017), external support systems are crucial in strengthening school leadership, particularly in contexts where policies are undergoing rapid changes. Without adequate supervision and technical support, head teachers may struggle to interpret financial policies correctly, leading to inconsistencies in implementation.

Training programs also play a vital role in shaping the effectiveness of school heads. Continuous professional development equips head teachers with up-to-date knowledge on financial accountability, leadership strategies, and resource management. Bush and Glover (2014) emphasize that training in leadership and financial management significantly enhances the ability of head teachers to handle school resources responsibly. In the absence of such training, head teachers may mismanage funds due to lack of knowledge rather than deliberate malpractice.



Equally important are infrastructure and resources, which act as enabling or constraining conditions. Even when head teachers are well trained and supported, inadequate infrastructure or insufficient teaching and learning materials may undermine effective grant utilization. Adequate classrooms, furniture, and instructional materials create a conducive environment for learning and make it easier for grants to translate into tangible outcomes. In contrast, scarcity of resources often compels head teachers to divert funds to emergency needs, thereby limiting their impact on long-term development (UNESCO, 2015).

The dependent variables represent the outcomes of effective or ineffective management of Free Education Grants. These include school performance, accountability and transparency, and learner and community satisfaction. School performance is directly tied to how resources are allocated and utilized. Proper management of grants ensures that teaching and learning activities are well-supported, contributing to better academic outcomes (Day & Sammons, 2016). Conversely, mismanagement of funds may lead to shortages of teaching materials, deteriorating infrastructure, and declining learner achievement.

Accountability and transparency are also central outcomes of the framework. The ability of head teachers to provide accurate and timely reports on financial utilization determines the level of trust from both authorities and communities. Transparent financial practices not only protect head teachers from allegations of mismanagement but also strengthen school-community relations (Bruns, Filmer & Patrinos, 2011). Weak accountability, on the other hand, undermines trust and may create suspicion that grants are being misused.

Learner and community satisfaction reflect the ultimate goal of education policy and grant allocation. When communities observe that resources are properly utilized, resulting in improved facilities, better teaching quality, and enhanced learner outcomes, their confidence in the school system is reinforced. This satisfaction fosters stronger partnerships between schools and communities, which in turn enhances sustainability. However, when mismanagement occurs, dissatisfaction grows, leading to tensions and loss of community trust in education leadership (Fullan, 2014).

The framework emphasizes the central role of head teachers as mediators between systemic inputs (independent variables) and educational outcomes (dependent variables). Their performance is not determined in isolation but is shaped by both their personal capacity and the support systems available to them. When head teachers are adequately trained, supported by district boards, and provided with sufficient resources, the likelihood of positive outcomes such as improved school performance, strong accountability, and community satisfaction increases. Conversely, when these conditions are absent, head teachers may fail to meet the expectations placed upon them, resulting in negative outcomes.



10. Definition of Key Terms / Operational Terms

- **Free Education Grant (FEG):** A government-allocated fund disbursed to public secondary schools to cover operational expenses, effectively replacing the previous system of school fees.
- **Head Teacher:** The senior administrator of a public secondary school, responsible for its academic, administrative, and financial management.
- **Senga Hill District:** A specific geographical and administrative area in Zambia where the study was conducted.
- **School Management:** The process of planning, organizing, coordinating, and controlling school resources, including finances, to achieve educational goals and ensure efficient operations.
- **Public Secondary Schools:** Educational institutions in Zambia that are owned and operated by the government and receive funding from the state.
- **Management:** The act or skill of controlling and making decisions on government financial resources.
- **Utilization:** To put government financial resources to use
- **Secondary School Education:** School education of grades 8 – 12.
- **Grants:** Non-repayable funds given to schools by the government.
- **Financial Management:** Planning, monitoring, organizing, and controlling of funds

II. Literature Review

1. Overview

The purpose of this chapter is to critically review existing literature that relates to the management of Free Education Grants, particularly focusing on the experiences of school head teachers in Zambia's secondary education system. A literature review is an essential component of any academic research as it synthesizes scholarly debates, identifies knowledge gaps, and situates the current study within established academic conversations. In this study, the literature review examines theoretical, empirical, and policy-based discussions on free education and school financing, both globally and within the Zambian context.

The review is structured thematically in line with the objectives of the study. It begins with a general discussion on the concept of free education and the rationale for state-led financing in education systems across the world. The review proceeds to analyze the Sub-Saharan African context, where the implementation of free education has often faced significant fiscal and administrative challenges. After situating the discussion globally and regionally, the chapter narrows down to the Zambian context, tracing the historical development of free education policies, the mechanisms of Free Education Grants, and their implementation in public schools.

The next sections discuss the challenges faced by school head teachers in grant management, followed by strategies that have been developed to mitigate these challenges and promote accountability. This is complemented by a review of the perceived impacts of grants on school operations, infrastructure, and the overall quality of education. Finally, the chapter highlights the knowledge gaps that remain



unaddressed by previous studies, thus justifying the significance of the present research in Senga Hill District.

By adopting this structure, the review not only ensures coherence but also connects the global, regional, and national perspectives to the lived realities of school head teachers in Zambia. Such an approach strengthens the credibility of the study and ensures that the findings are grounded in both scholarly debates and practical realities (Creswell & Creswell, 2018).

2. The Concept of Free Education and School Financing

Free education, broadly defined, refers to the removal of direct financial barriers to schooling, particularly tuition fees, so that learners can access education without the burden of personal or household payments. Globally, the concept of free education has been widely embraced as a strategy for promoting equity, improving literacy levels, and enhancing human capital development (UNESCO, 2021). The idea is grounded in international commitments such as the Universal Declaration of Human Rights (1948) and the Sustainable Development Goal 4 (SDG4), which emphasize inclusive and equitable quality education for all.

Historically, developed countries such as the Nordic states (e.g., Finland, Sweden, and Norway) pioneered comprehensive free education policies, financing public education entirely through government taxation. These countries have consistently ranked high in global education indexes, demonstrating that equitable financing systems contribute to high learning outcomes and social mobility (Sahlberg, 2015). In contrast, developing countries, particularly in Africa and Asia, have introduced free education in phases, often in response to political promises or donor pressure, but face persistent sustainability and management challenges (Kattan & Burnett, 2004).

The financing of free education is often justified on economic, social, and political grounds. Economically, investment in education is perceived as an investment in human capital, with long-term benefits for national productivity and innovation (Becker, 1993). Socially, free education is considered a tool for reducing inequality and breaking intergenerational cycles of poverty, as it widens access to disadvantaged groups. Politically, governments introduce free education to enhance legitimacy, social cohesion, and citizen support (Lewin, 2007).

In many developing countries, however, the introduction of free education policies has been associated with significant financing shortfalls. For instance, Uganda's Universal Primary Education (UPE) initiative, launched in 1997, saw a dramatic increase in enrollment but placed unsustainable pressure on existing infrastructure and teaching staff (Nishimura et al., 2009). Similarly, Kenya's Free Primary Education Program (FPE), introduced in 2003, recorded remarkable gains in enrollment, yet persistent funding delays, mismanagement of grants, and poor accountability mechanisms undermined its effectiveness (Bold et al., 2011).

At the heart of free education is the question of financing models. In developed countries, financing is predominantly tax-based and integrated into national public financial management systems. In low- and middle-income countries, financing is often



supplemented by international aid, donor grants, or community contributions, raising concerns about long-term sustainability (World Bank, 2018). The reliance on external support also exposes education financing to vulnerabilities in donor priorities and political shifts.

Furthermore, free education policies are often misunderstood as completely costless. While tuition fees may be abolished, indirect costs such as uniforms, textbooks, transportation, and examination fees continue to pose barriers to access, particularly for poor households (Bray, 2007). Governments thus face the challenge of ensuring not only the removal of tuition fees but also the provision of adequate grants to cover operational needs in schools.

For this reason, many education systems have developed school grant financing models, where governments disburse funds directly to schools to replace fees once paid by parents. These grants are intended to cover non-salary recurrent expenditures such as teaching materials, minor repairs, utilities, and administrative costs (UNESCO, 2015). However, effective management of these grants depends on the financial skills, accountability structures, and leadership capacity of school administrators, particularly head teachers.

Free education has also been criticized for leading to quality compromises if not adequately funded. Research in sub-Saharan Africa has shown that while free education policies rapidly expand enrollment, they often outpace government spending, resulting in overcrowded classrooms, teacher shortages, and inadequate infrastructure (Oketch & Rolleston, 2007). Thus, financing free education requires not only political will but also careful planning, monitoring, and strong fiscal management systems.

In Zambia, the concept of free education is aligned with the country's constitutional and policy frameworks that recognize education as both a right and a public good (MoE, 2016). The implementation of Free Education Grants reflects a government commitment to reduce household financial burdens and improve school operations. However, as will be discussed later, challenges in the timely disbursement, utilization, and accountability of these grants raise critical questions about their effectiveness in achieving the intended goals.

3. School Grant Management: Global Perspectives

School grant management has become a central feature of education financing reforms worldwide, particularly in contexts where governments seek to decentralize resources directly to schools. The idea is that direct financial transfers empower schools to meet their operational needs, enhance accountability, and reduce bureaucratic delays associated with centralized procurement (World Bank, 2016). Globally, school grants have been promoted as a mechanism for improving both efficiency and equity in education service delivery.

In Latin America, countries such as Brazil and Chile pioneered school-based financing reforms in the 1980s and 1990s, shifting decision-making power from central ministries to local schools and communities. In Brazil, the Fundo de Manutenção e Desenvolvimento da Educação Básica (FUNDEB) provided block grants to schools,



enabling them to purchase essential learning materials and maintain facilities. Evaluations of these reforms indicated improvements in resource allocation, but also highlighted challenges in ensuring equitable distribution across poorer and wealthier regions (Crouch & DeStefano, 2017).

In Asia, the Philippines adopted the School-Based Management (SBM) Grants program under its Basic Education Sector Reform Agenda (BESRA). Schools received grants to finance small-scale projects aimed at improving teaching and learning environments. While these grants enhanced school autonomy and encouraged participatory decision-making involving parents and teachers, studies noted capacity gaps among school heads in financial management, resulting in irregularities in fund utilization (Yap et al., 2017). India's Sarva Shiksha Abhiyan (SSA), launched in 2001, provides another example of school grants in practice. The program disbursed funds directly to schools for infrastructure improvements, textbooks, and teacher training. Research indicates that while the grants improved access and reduced dropout rates, the absence of rigorous monitoring systems created opportunities for misallocation of funds (De et al., 2011). This experience reflects a recurring challenge in school grant management globally—the tension between increasing school-level autonomy and maintaining strong accountability structures.

In Sub-Saharan Africa, school grants have been introduced as a key element of fee abolition policies. Uganda's Capitation Grant, introduced with the Universal Primary Education (UPE) program, aimed to replace household contributions by allocating funds per enrolled pupil. However, evaluations revealed systemic challenges, including delayed disbursements, diversion of funds at district levels, and lack of community awareness about grant entitlements (Reinikka & Svensson, 2004). Similarly, in Kenya, the introduction of the Free Primary Education (FPE) grants in 2003 allowed schools to access government funds directly. While this significantly expanded enrollment, head teachers frequently reported inadequate financial training and difficulties in reconciling accounts for auditing purposes (Ngware et al., 2006).

One lesson drawn from global experiences is that the success of grant programs largely depends on the capacity of school leaders to manage resources effectively. Where head teachers possess financial literacy and are supported by functional school management committees, grants have been shown to improve transparency and enhance learning outcomes (Bruns et al., 2011). Conversely, in contexts where school leaders lack adequate training, grants often lead to mismanagement, conflict with parents, and inefficiencies in fund utilization.

Another critical insight relates to community involvement in grant management. In Indonesia, the School Operational Assistance Grant (BOS) required schools to involve school committees in budgeting decisions. This participatory approach helped increase transparency and reduced misuse of funds, as parents and community members were empowered to hold school leaders accountable (Chen, 2011). However, evidence also shows that in many cases, community participation remained tokenistic, with limited influence on decision-making (Edwards, 2019).



Moreover, grant management systems across the globe have faced the recurring challenge of delayed disbursements. For example, in Malawi, studies on the Direct Support to Schools Program revealed that funds often arrived late, disrupting planned school activities and forcing head teachers to borrow or suspend operations (Chimombo, 2009). Timeliness of grant delivery thus emerges as a crucial factor for effective management, particularly in resource-constrained environments.

International research also underscores the need for robust monitoring and evaluation systems. In Ghana, the Capitation Grant Scheme was designed to improve school-level accountability, yet lack of trained auditors and inconsistent record-keeping weakened oversight mechanisms (Osei et al., 2009). The same challenge has been echoed in many other contexts, where monitoring remains limited to compliance checks rather than focusing on how grants contribute to improved educational outcomes.

A further perspective relates to equity in grant allocation. Some studies highlight that per-capita funding formulas often disadvantage rural and marginalized schools, as they require higher operational costs than urban schools. For instance, in Tanzania, smaller rural schools struggled to cover essential needs despite receiving similar per-pupil allocations as larger schools, highlighting the importance of context-sensitive financing models (Al-Samarrai & Zaman, 2007).

Global literature suggests that while school grants are instrumental in reducing the financial burden on parents and supporting free education, their effectiveness is conditioned by three interrelated factors: the capacity of school administrators, the robustness of accountability mechanisms, and the efficiency of disbursement systems. Best practices from around the world demonstrate that where these elements are aligned, grants can improve both access and quality in education. Where they are absent, grants may inadvertently exacerbate inequalities and undermine the goals of free education (World Bank, 2018).

3. Education Financing in Sub-Saharan Africa

Education financing in Sub-Saharan Africa (SSA) remains one of the most pressing challenges for governments seeking to achieve universal access and quality education. Historically, many countries in the region have relied on a combination of government funding, donor assistance, and community contributions to meet operational and infrastructural needs in schools (World Bank, 2018). Despite these efforts, gaps in financing, coupled with administrative inefficiencies, continue to limit the effectiveness of education policies, including fee abolition programs.

A significant feature of education financing in SSA is the introduction of capitation grants or school-level block grants aimed at replacing household fees. Uganda's Capitation Grant, for example, was introduced to support the Universal Primary Education program. While the grant increased access and school enrolment, studies revealed systemic delays in disbursement and inconsistent allocations across districts, which affected head teachers' ability to plan and execute school activities (Reinikka & Svensson, 2004). This underscores a recurring pattern in SSA where policy intentions are undermined by practical management challenges.



In Kenya, the Free Primary Education (FPE) initiative illustrates the duality of opportunities and challenges in grant management. While the grants facilitated enrollment expansion, head teachers reported substantial difficulties in reconciling accounts and tracking expenditures due to limited financial management skills (Ngware et al., 2006). Moreover, the rapid increase in enrollment created strains on infrastructure and learning materials, highlighting the critical need for adequate funding levels alongside proper management mechanisms.

Similarly, in Tanzania, education financing reforms, including school block grants, have been widely implemented to promote equity and access. However, research indicates that rural schools often receive the same per-pupil funding as urban schools, despite higher costs associated with sparsely populated or remote areas (Al-Samarrai & Zaman, 2007). This illustrates the importance of context-sensitive financing models that consider school size, geographic location, and resource needs.

Another challenge prevalent in SSA is the issue of corruption and mismanagement of grants. Studies across Ghana, Malawi, and Zambia indicate that insufficient oversight and weak accountability systems allow for diversion of funds intended for operational expenditures (Osei et al., 2009; Chimombo, 2009; MoE Zambia, 2016). Head teachers are often caught between community expectations, government reporting requirements, and administrative pressures, which complicates transparent and effective grant utilization.

Financial capacity at the school level is another critical determinant of grant effectiveness. In many SSA countries, school administrators, particularly head teachers, lack training in accounting, budgeting, and auditing, which results in inefficiencies and compliance issues. For instance, research in Malawi found that many head teachers relied on informal record-keeping, making audits and accountability processes challenging (Chimombo, 2009). This highlights the intersection of human capacity and structural factors in shaping grant outcomes.

Delays in disbursement of funds further exacerbate financing challenges in SSA. In Uganda, for example, schools frequently received Capitation Grants months after the start of the academic year, which disrupted instructional planning and hindered infrastructure maintenance (Reinikka & Svensson, 2004). Similar experiences have been reported in Zambia, where late grant disbursements compromise schools' ability to implement timely interventions (MoE, 2016). Such delays not only affect operational efficiency but also undermine the perceived reliability and credibility of government support among school communities.

Despite these challenges, SSA countries have also demonstrated innovative strategies to strengthen grant management. In Ghana, the Capitation Grant Scheme introduced mandatory reporting and the involvement of School Management Committees in monitoring expenditures (Osei et al., 2009). In Kenya, training workshops for head teachers on financial management improved compliance and transparency in grant utilization (Ngware et al., 2006). These initiatives suggest that targeted capacity building and participatory governance can significantly improve outcomes.



The literature also emphasizes the importance of equity-focused financing. Rural and disadvantaged schools often face compounded challenges due to underfunding, geographic isolation, and limited community capacity for supplementary contributions. In Tanzania, per-student grant allocations without adjustments for rural cost factors have been criticized for perpetuating inequities in educational quality (Al-Samarrai & Zaman, 2007). Therefore, equitable allocation mechanisms remain a central concern in SSA education financing policies.

Donor influence is another critical dimension. In many SSA countries, donor funding supplements government grants, particularly for teacher training, infrastructure, and instructional materials. While such contributions are valuable, they can create dependency and misalignment with national priorities if not carefully coordinated (Lewin, 2007). This raises questions about sustainability and long-term planning in the management of free education grants.

Research indicates that the effectiveness of school grants in SSA is closely linked to local governance and accountability structures. Schools with active School Management Committees or parent-teacher associations that monitor expenditures tend to demonstrate higher transparency and better utilization of resources (Bold et al., 2011). Conversely, where local governance is weak, grants are more susceptible to diversion, misuse, or inefficiency.

Sub-Saharan African literature highlights both the potential and the limitations of school-level grants as instruments for financing free education. While grants can enhance access, support school operations, and reduce financial barriers for learners, their effectiveness depends on timely disbursement, adequate human and institutional capacity, robust accountability mechanisms, and context-sensitive allocation models.

4. The Zambian Context: Free Education and Grants

Zambia's education system has undergone significant transformation since independence in 1964, with free education emerging as a central policy to enhance access, equity, and quality. Initially, education was largely fee-based, with households expected to contribute significantly to school operations, which limited access for children from low-income families (Chanda, 2014). Recognizing the social and economic costs of educational exclusion, successive Zambian governments have increasingly emphasized state-funded education.

The introduction of Free Education Grants in Zambia represents a key government strategy to operationalize fee-free education, particularly in public secondary schools. These grants are intended to cover non-salary recurrent costs such as teaching and learning materials, minor repairs, utilities, and administrative expenses (Ministry of Education [MoE], 2016). By providing direct financial support to schools, the government aims to alleviate the burden on households and ensure that schools can maintain functional learning environments.

Historically, Zambia's Free Education policy was initially focused on primary education, but it has gradually extended to cover secondary education through the provision of grants and capitation funding. The policy aligns with international



commitments such as UNESCO's Education for All (EFA) goals and the Sustainable Development Goals (SDG4), reflecting Zambia's commitment to promoting inclusive and equitable education (UNESCO, 2015).

The administration of Free Education Grants in Zambia is decentralized, with the Ministry of Education responsible for policy formulation and oversight, while Local Education Authorities and District Education Offices handle disbursement and monitoring (MoE, 2016). This decentralized model is intended to increase efficiency, reduce bureaucratic delays, and empower school administrators to make context-specific decisions regarding resource utilization.

Despite the intended benefits, literature indicates that Zambia faces multiple challenges in implementing free education and managing grants effectively. Head teachers frequently report delays in fund disbursement, which disrupts the procurement of teaching materials, school maintenance, and other operational needs (Chanda, 2014). These delays often force schools to seek alternative funding sources or defer planned activities, negatively affecting the learning environment and overall school performance.

Capacity limitations at the school level further complicate grant management. Research by Simukonda (2018) notes that many head teachers in Zambia lack formal training in financial management, accounting, and auditing. As a result, schools struggle with record-keeping, expenditure tracking, and compliance with government reporting requirements. This situation mirrors challenges observed in other Sub-Saharan African countries, emphasizing the critical role of human capacity in ensuring effective grant utilization.

Transparency and accountability are additional concerns. Cases of misappropriation and misuse of funds have been documented, often arising from weak internal controls and limited community oversight (MoE, 2016). In response, the government has promoted the involvement of School Management Committees and Parent-Teacher Associations in monitoring grant utilization. While this has improved transparency in some schools, enforcement remains inconsistent, particularly in rural and under-resourced districts.

The impact of Free Education Grants in Zambia has been positive in certain respects. Studies indicate that schools receiving grants have been able to procure essential teaching and learning materials, maintain infrastructure, and provide a more conducive learning environment (Simukonda, 2018). Moreover, the grants have contributed to increased enrollment and reduced dropout rates, as financial barriers for households are partially alleviated. However, these outcomes are uneven, with rural schools often struggling to achieve the same results as urban schools due to logistical and contextual challenges.

In Senga Hill District specifically, head teachers face unique operational realities shaped by geographic isolation, resource constraints, and limited administrative support. Research indicates that rural districts in Zambia often experience late or partial disbursement of grants, limited monitoring, and capacity gaps among school



administrators (Chanda, 2014; Simukonda, 2018). These factors highlight the importance of context-specific strategies to ensure the effective and transparent utilization of Free Education Grants.

The Zambian policy framework for Free Education Grants is guided by a combination of legislation and government directives, including the Education Act and subsequent Ministry of

Education guidelines. These policies outline eligibility criteria, permissible expenditures, reporting requirements, and the roles of key actors in grant management (MoE, 2016). However, gaps remain in the operationalization of these guidelines, particularly regarding training, supervision, and community engagement.

In addition, Zambia's reliance on central government funding makes the system vulnerable to fiscal fluctuations. Economic downturns or competing budgetary priorities can lead to reduced allocations or delayed disbursements, further complicating school-level planning and operations (Chanda, 2014). This underscores the need for sustainable financing mechanisms and robust financial planning at both the national and school levels.

Overall, the Zambian experience illustrates that Free Education Grants are a critical instrument for promoting educational access and quality, but their effectiveness is contingent upon timely disbursement, adequate administrative capacity, transparency, and context-sensitive management. These realities provide the basis for analyzing the challenges and strategies that head teachers adopt in managing grants, which will be explored in subsequent sections.

5. Challenges in Managing Free Education Grants

The management of Free Education Grants in Zambia, particularly in public secondary schools, presents a series of complex challenges for head teachers. These challenges range from financial management capacity, delays in disbursement, and accountability issues, to broader administrative and contextual constraints. Understanding these challenges is critical for assessing the effectiveness of the grants and their contribution to improving educational outcomes.

A major challenge faced by head teachers is the limited financial management capacity. Many school leaders lack formal training in accounting, budgeting, and financial reporting, which undermines their ability to manage grant funds effectively. Simukonda (2018) notes that head teachers often rely on informal methods of record-keeping, which complicates auditing and accountability. Similar findings have been reported across Sub-Saharan Africa, indicating that human capacity is a critical determinant of successful school grant management (Reinikka & Svensson, 2004; Ngware et al., 2006).

Delays in disbursement of grant funds represent another persistent challenge. Schools frequently receive funds late in the academic year, disrupting operational plans such as purchasing teaching



materials, maintaining infrastructure, or covering utility costs. Chanda (2014) observes that such delays in Zambia force head teachers to borrow funds from local communities or delay essential school activities, negatively affecting the learning environment. Delays not only reduce operational efficiency but also erode the credibility of government support among school staff and parents.

Another significant challenge is the lack of training in accounting and reporting. Head teachers are often expected to prepare financial reports, reconcile accounts, and submit detailed expenditure statements without receiving sufficient guidance or support. The absence of formal training increases the likelihood of errors, misreporting, or inadvertent misuse of funds (MoE, 2016). This highlights the gap between policy expectations and practical capacity at the school level.

Misappropriation risks and weak accountability mechanisms exacerbate the challenge. In some cases, the lack of robust internal controls, monitoring systems, and community oversight allows for diversion of funds intended for operational needs (Osei et al., 2009). While Ministry of Education guidelines stipulate the roles of School Management Committees and parent participation, enforcement is often inconsistent, particularly in rural districts like Senga Hill. Head teachers, therefore, navigate complex expectations from both government and communities while attempting to maintain transparency.

High workload and administrative pressures further complicate grant management. Head teachers are responsible for teaching supervision, student discipline, curriculum implementation, staff management, and community relations, in addition to managing school finances. Studies in Zambia indicate that the multiplicity of roles often leads to stress, delays in financial reporting, and occasional lapses in compliance (Simukonda, 2018). The workload challenge is particularly acute in under-resourced schools where administrative support staff are limited or absent.

The challenge of limited oversight and monitoring at district and provincial levels also affects grant management. While decentralization aims to empower schools, insufficient supervisory visits and irregular audits reduce accountability and may result in funds being misused or inefficiently applied (Chimombo, 2009). This problem is compounded in rural areas, where logistical constraints limit the frequency and effectiveness of monitoring.

Contextual and geographic constraints pose additional difficulties. In remote districts like Senga Hill, head teachers often contend with poor infrastructure, limited access to banking facilities, and challenges in procuring educational materials. These factors make it harder to plan, manage, and disburse grant funds effectively (Chanda, 2014). Such constraints also amplify the risk of delays and increase the burden on head teachers to find alternative solutions.

The unpredictability of fund allocation is another challenge. In some years, schools receive lower- than-expected allocations due to budgetary constraints or shifting government priorities. This unpredictability complicates planning and often forces head



teachers to prioritize some activities while deferring others, potentially undermining the overall quality of education (MoE, 2016).

Research indicates that community expectations and pressure can also affect grant management. Parents and local stakeholders often expect head teachers to meet all school needs from limited grant allocations. This can create tensions and reduce head teachers' flexibility in allocating resources according to the most urgent operational needs (Simukonda, 2018).

Moreover, technological and infrastructural limitations hinder efficient financial management. Many schools lack computerized accounting systems and rely on manual record-keeping, which is prone to errors, delays, and reduced transparency (Ngware et al., 2006). This technological gap affects timely reporting and complicates auditing procedures.

Coordination with higher authorities remains a significant challenge. Head teachers must navigate multiple reporting lines, comply with Ministry of Education regulations, and interact with district education offices. Miscommunication or inconsistent instructions from higher authorities can create confusion, delays, and inefficiencies in grant management (Chimombo, 2009).

The challenges in managing Free Education Grants are multi-faceted, encompassing human capacity, administrative pressures, delayed disbursements, accountability issues, and contextual constraints. Addressing these challenges is essential for ensuring that grants achieve their intended objectives of enhancing school operations, infrastructure, and the quality of education. The subsequent section will explore strategies adopted by head teachers to mitigate these challenges and improve the effectiveness and transparency of grant utilization.

7. Strategies for Effective Management of Grants

Effective management of Free Education Grants requires deliberate strategies by school head teachers to overcome challenges and ensure transparency, accountability, and optimal utilization of resources. Research highlights that a combination of capacity-building, community involvement, monitoring mechanisms, and technology integration is crucial to enhance the efficiency of grant management (Bruns et al., 2011).

One primary strategy is capacity building and training for school administrators. Head teachers who receive targeted training in financial management, budgeting, and reporting demonstrate higher competence in utilizing grants effectively. Simukonda (2018) reports that trained head teachers in Zambia were better able to reconcile accounts, maintain accurate records, and comply with Ministry of Education requirements. Similar findings in Kenya and Uganda suggest that continuous professional development in financial management improves transparency and reduces risks of misappropriation (Ngware et al., 2006; Reinikka & Svensson, 2004). Training programs often cover areas such as record-keeping, procurement procedures, fund allocation, and auditing practices.

Community involvement and participatory governance represent another critical strategy. Engaging School Management Committees (SMCs), Parent-Teacher



Associations (PTAs), and local stakeholders in decision-making processes enhances transparency and fosters collective accountability. Chanda (2014) observes that schools with active community participation in Zambia experienced fewer instances of misappropriation and more effective use of grants. Globally, Indonesia's BOS program and Ghana's Capitation Grant Scheme demonstrate that participatory governance empowers communities to monitor expenditures, validate priorities, and support school planning (Chen, 2011; Osei et al., 2009).

The implementation of internal monitoring and reporting mechanisms is essential for effective grant management. Head teachers can establish school-level audits, routine financial reviews, and internal checks to track fund utilization. Such mechanisms help detect errors, prevent misuse, and ensure compliance with government guidelines. In Zambia, schools that adopted structured reporting templates and internal oversight practices exhibited improved financial discipline (MoE, 2016). Internal monitoring also provides evidence for external audits, strengthening accountability to district education offices.

Use of technology and financial management systems is increasingly recognized as a strategy to enhance efficiency and reduce errors. Computerized accounting systems, digital record-keeping, and online reporting platforms allow head teachers to track expenditures accurately and generate timely reports. Ngware et al. (2006) highlight that schools in Kenya that adopted technology-driven accounting systems experienced reduced delays and improved transparency in fund management. While rural Zambian schools face infrastructural and connectivity challenges, even basic digital tools such as spreadsheet applications can improve fund tracking and reporting.

Another strategy is prioritization and strategic allocation of funds. Head teachers are required to allocate grants according to urgent school needs, balancing operational, instructional, and infrastructural requirements. Simukonda (2018) notes that prioritizing essential expenditures, such as teaching materials and facility maintenance, ensures that limited funds generate maximum impact on learning outcomes. Strategic planning and budgeting are particularly crucial in rural and under-resourced schools, where grants may not cover all operational costs.

Collaboration and networking with district authorities and other schools is an additional approach. Sharing best practices, consulting with finance officers, and participating in peer-learning forums help head teachers adopt innovative management techniques and address common challenges. Chimombo (2009) observes that collaboration between schools and district education offices in Malawi facilitated timely fund utilization and improved adherence to reporting standards. Networking allows head teachers to learn from both successes and failures in grant management across similar contexts.

Capacity for accountability and transparency in reporting is strengthened through regular financial audits. Head teachers who conduct routine internal audits and prepare documentation for external verification improve trust among stakeholders. Research in Ghana and Uganda demonstrates that schools with structured audit systems experienced reduced corruption and better alignment of expenditures with intended objectives (Reinikka & Svensson, 2004; Osei et al., 2009). In Zambia, promoting audit readiness



at the school level can enhance confidence among parents, communities, and Ministry officials.

Advocacy for timely and adequate fund disbursement is another proactive strategy. Head teachers can engage with district and provincial authorities to ensure predictable and sufficient allocation of grants. Evidence from Sub-Saharan Africa suggests that head teachers who maintain communication channels with authorities are better able to plan operations and minimize disruptions caused by delayed funding (Chimombo, 2009). Advocacy also allows schools to highlight emerging challenges and request adjustments in allocation where necessary.

Integration of participatory budgeting has been shown to enhance ownership and accountability. By involving teachers, students, and community representatives in planning and budgeting processes, schools ensure that grant utilization reflects collective priorities. In Indonesia and parts of Africa, participatory budgeting has strengthened local governance and reduced opportunities for fund diversion (Chen, 2011; Bold et al., 2011). In Zambia, such approaches can empower communities in rural districts to monitor school expenditures effectively.

Adoption of clear financial policies and standard operating procedures (SOPs) is also vital. Head teachers who establish internal guidelines for procurement, fund disbursement, and record-keeping reduce ambiguity and prevent misuse. The Ministry of Education in Zambia provides templates and guidelines, but schools that adapt these to local contexts experience more structured and accountable grant management (MoE, 2016).

Engagement in continuous professional development and knowledge exchange ensures that head teachers remain updated on best practices in financial management and grant utilization. Participation in workshops, seminars, and online learning platforms allows school leaders to adopt innovative strategies and adjust to changing policy requirements. Evidence from SSA indicates that professional development improves leadership capacity, which directly influences effective grant management (Simukonda, 2018; Bruns et al., 2011).

The strategies for effective grant management are multifaceted and interdependent. Capacity building, participatory governance, internal monitoring, technology use, strategic allocation, networking, audits, advocacy, participatory budgeting, SOPs, and professional development collectively contribute to enhancing transparency, accountability, and efficiency in Free Education Grant utilization. The successful implementation of these strategies is essential for achieving the intended impact of grants on school operations, infrastructure, and learning outcomes.

8. Perceived Impact of Free Education Grants on Schools

The provision of Free Education Grants in Zambia has been associated with multiple perceived impacts on school operations, infrastructure, and the overall quality of education. These impacts are mediated by factors such as timeliness of disbursement, the capacity of head teachers to manage resources, and the level of community involvement in grant utilization (Simukonda, 2018).



A key perceived impact is the enhancement of school operations, particularly in relation to teaching and learning activities. Schools receiving grants are better able to procure essential instructional materials, including textbooks, laboratory supplies, and stationery, which improves teaching efficiency and student engagement (Chanda, 2014). Head teachers have reported that access to funds allows for timely replenishment of learning resources, directly contributing to improved classroom experiences and learner performance.

Free Education Grants also positively affect teacher motivation and retention. When schools have adequate resources, teachers are less likely to face personal financial burdens associated with classroom materials or supplementary costs. Simukonda (2018) observes that head teachers in Zambia perceive grants as reducing conflicts between staff and management over resource shortages, thereby creating a more conducive working environment. This aligns with broader research in SSA, where operational funding correlates with improved teacher satisfaction and commitment (Bold et al., 2011).

Infrastructure development and maintenance constitute another significant impact of the grants. Head teachers report that funds are frequently used for minor repairs, classroom maintenance, and improvement of sanitation facilities. Such investments enhance the physical learning environment, contributing to student well-being and school functionality (MoE, 2016). In rural districts like Senga Hill, these grants are often the only source of funding for urgent maintenance, highlighting their critical role in sustaining school infrastructure.

Free Education Grants also contribute to enhanced access and equity in education. By reducing or eliminating costs that would otherwise fall on households, the grants enable more children, particularly from low-income families, to attend school (UNESCO, 2015). This impact is particularly pronounced in rural areas, where financial barriers have historically limited enrollment and attendance. The grants thereby support Zambia's broader goals of universal access and inclusive education.

Another perceived impact is the improvement of school autonomy and decision-making. Head teachers report that direct access to funds allows them to make operational decisions without waiting for centralized approval. This includes prioritizing expenditures, responding to urgent needs, and planning school activities strategically. Bruns et al. (2011) emphasize that school-level autonomy in resource allocation is closely linked to improved responsiveness and efficiency in educational delivery.

The grants are also perceived to have indirect effects on student learning outcomes. Research indicates that improved access to teaching materials, better-maintained infrastructure, and supportive learning environments positively influence student engagement and achievement (Lewin, 2007). While causality is complex, head teachers often link the availability of resources from grants to enhanced academic performance and reduced dropout rates in their schools (Simukonda, 2018).



Despite these positive impacts, the literature notes that the benefits of Free Education Grants are unevenly distributed, particularly between urban and rural schools. Rural schools often face delayed disbursement, higher operational costs, and limited access to supplementary resources, which constrains the full potential of the grants (Chanda, 2014). Head teachers in these areas frequently perceive the grants as insufficient to meet all school needs, highlighting the importance of context-specific allocations and planning.

Community perception of grant impact is another dimension. Parents and local stakeholders often view grants as essential in reducing the burden of school fees and supporting learning. Active community participation in monitoring and budgeting further enhances the perceived legitimacy and effectiveness of grant utilization (Osei et al., 2009). Schools where communities are engaged report fewer disputes over expenditures and higher levels of local support.

Free Education Grants also influence administrative efficiency. Head teachers report that having dedicated funds allows for smoother operations, better financial planning, and fewer interruptions in school activities. Simukonda (2018) notes that schools with structured financial management systems can respond promptly to emergent needs, such as repairing broken facilities or purchasing additional teaching materials, thereby reducing operational disruptions.

In addition, the grants contribute to capacity building at the school level. Through the necessity of managing funds, head teachers and school committees develop skills in budgeting, reporting, and planning. Over time, this strengthens institutional capacity and improves overall school governance (Bruns et al., 2011).

Motivation among students can also be indirectly linked to grant utilization. When schools are adequately resourced, students perceive their learning environment as supportive, which can enhance engagement, attendance, and retention (Lewin, 2007). Head teachers report anecdotal evidence of increased participation and interest among learners when resources are available and classrooms are well-maintained.

The perceived impact of Free Education Grants extends to policy credibility and trust in government initiatives. Schools that receive timely and adequate funding foster confidence among teachers, parents, and communities in the government's commitment to education. Conversely, delayed or insufficient grants can erode trust and generate frustration, emphasizing the importance of reliable and transparent grant systems (MoE, 2016).

The literature indicates that Free Education Grants in Zambia positively affect school operations, teacher motivation, infrastructure, student engagement, and governance. However, these benefits are mediated by factors such as fund adequacy, timeliness, administrative capacity, and community involvement. Understanding these perceived impacts provides the basis for evaluating the effectiveness of grant management strategies employed by head teachers in Senga Hill District.



9. Knowledge Gaps in Existing Literature

Despite extensive research on education financing, free education policies, and school grants, significant knowledge gaps remain, particularly regarding the experiences of school head teachers in managing Free Education Grants in Zambia. While global studies provide valuable insights into grant management, challenges, and impacts, these findings often do not account for context-specific factors unique to rural districts like Senga Hill.

One major gap is the limited focus on the lived experiences of head teachers in rural contexts. Most studies, such as those by Ngware et al. (2006) in Kenya or Reinikka and Svensson (2004) in Uganda, primarily examine quantitative outcomes such as enrollment rates or financial compliance. While these provide important information on systemic effectiveness, they do not capture the nuanced challenges, strategies, and perceptions of school leaders responsible for operationalizing grant utilization on a daily basis.

There is also a lack of research on the intersection of administrative capacity and grant effectiveness in Zambia. Existing studies (Chanda, 2014; Simukonda, 2018) highlight capacity limitations among head teachers but do not systematically explore how these limitations affect decision-making, prioritization, and transparency in grant management. This gap is critical because the ability of head teachers to navigate administrative pressures directly influences the outcomes of Free Education Grants.

Another gap concerns context-specific challenges in rural districts. While national-level studies provide general insights, they often overlook the unique logistical, infrastructural, and geographic factors that affect grant utilization in remote areas. For example, rural schools may face challenges related to delayed disbursement, limited access to banks or suppliers, and heightened operational costs, all of which affect the effectiveness of grants (MoE, 2016). Senga Hill District, with its rural characteristics, represents a context where these challenges are particularly salient but underexplored in literature.

The literature also shows a deficiency in examining strategies employed by head teachers to mitigate challenges. While Bruns et al. (2011) and Simukonda (2018) mention capacity building and community involvement as potential solutions, there is limited empirical evidence detailing how head teachers practically implement these strategies, what works, and what remains ineffective. Understanding these strategies is essential for informing policy and practice in similar contexts.

Furthermore, the impact of grants on school operations beyond infrastructure and materials is under-researched. While studies emphasize increased enrollment and access, fewer explore qualitative outcomes such as teacher motivation, administrative efficiency, participatory governance, and student engagement (Lewin, 2007; Simukonda, 2018). Such outcomes are closely tied to the effective management of funds but remain poorly documented, particularly in Zambia's rural secondary schools.

Another gap is the limited integration of local community perspectives in existing studies. While some research acknowledges the role of School Management Committees and Parent-Teacher Associations (Osei et al., 2009), there is little



exploration of how community engagement affects transparency, accountability, and the strategic allocation of grants at the school level. These insights are critical for designing participatory models of grant management that are contextually relevant. The role of monitoring and evaluation mechanisms in enhancing grant effectiveness is another underexplored area. Although Ministry guidelines exist, literature provides limited evidence on how internal and external audits, reporting systems, and supervisory visits influence fund utilization at the school level (MoE, 2016). Understanding the effectiveness of these mechanisms is key to identifying gaps between policy and practice.

Moreover, the sustainability of Free Education Grants is insufficiently addressed in the literature. Most studies focus on short-term outcomes such as immediate resource provision, enrollment, and material availability but neglect long-term sustainability concerns, including funding predictability, inflation-adjusted allocations, and alignment with broader educational development goals (World Bank, 2018).

There is also a deficit in comparative studies within Zambia, analyzing how challenges, strategies, and impacts differ between districts, schools, or urban versus rural contexts. Such comparisons could reveal important lessons about contextual adaptation and best practices for grant management. Without this knowledge, national policies risk being applied uniformly, without accounting for district-specific realities.

Finally, the experiences of head teachers as key decision-makers in grant management remain largely anecdotal or underreported. Their insights, coping mechanisms, and perceptions of impact are critical for understanding both the strengths and limitations of the Free Education Grant system. Capturing these experiences in Senga Hill District will address a crucial gap in the literature and provide empirical evidence to inform policy and practice.

10. Summary of the Literature Review

The literature reviewed in this chapter highlights the multifaceted nature of Free Education Grants, situating the study within global, regional, and national scholarship. Globally, school grants have been identified as a critical mechanism for enhancing educational access, equity, and quality. Countries in Latin America, Asia, and Sub-Saharan Africa demonstrate that direct financial transfers to schools can empower administrators, improve teaching and learning conditions, and foster community participation, provided that adequate training, monitoring, and accountability mechanisms are in place (Bruns et al., 2011; Chen, 2011; Ngware et al., 2006). These experiences offer valuable lessons for Zambia, particularly regarding capacity building, transparency, and participatory governance.

The review emphasizes that Sub-Saharan African contexts face persistent challenges in school grant management, including delays in disbursement, inadequate financial skills among head teachers, weak accountability, and inequitable allocation across rural and urban schools (Reinikka & Svensson, 2004; Chimombo, 2009). These challenges directly affect the operational efficiency of schools and the impact of grants on learners. In Zambia, similar issues are evident, with head teachers reporting late fund



disbursement, administrative workload, and limitations in financial management capacity (Chanda, 2014; Simukonda, 2018).

Literature specific to Zambia highlights the critical role of Free Education Grants in promoting access to secondary education, improving school infrastructure, and supporting teaching and learning activities. Head teachers' management practices and strategies, such as capacity building, participatory governance, and internal monitoring, are central to the effective utilization of grants (MoE, 2016; Simukonda, 2018). However, the reviewed studies also underscore challenges, including misappropriation risks, limited oversight, and insufficient community engagement, which compromise the potential benefits of grants.

The literature demonstrates that the perceived impacts of Free Education Grants extend beyond infrastructure and material provision. Effective grant utilization can enhance teacher motivation, school autonomy, administrative efficiency, student engagement, and overall quality of education (Lewin, 2007; Bruns et al., 2011). These impacts are contingent upon timely disbursement, adequate allocation, and head teachers' capacity to strategically plan and manage resources.

Despite the breadth of scholarship, significant knowledge gaps remain. The literature provides limited insights into the lived experiences of head teachers in rural Zambian districts such as Senga Hill, including the specific challenges they face, strategies they adopt, and perceptions of grant impact. Additionally, existing studies often focus on quantitative outcomes and overlook qualitative dimensions, such as participatory governance, community engagement, and the nuanced decision-making processes employed by school leaders.

This review also identifies gaps related to context-specific factors that affect grant management in rural areas, including geographic isolation, infrastructural limitations, and resource constraints. The sustainability of grants, effectiveness of monitoring mechanisms, and comparative analyses across districts remain underexplored, leaving a critical gap for policymakers and researchers seeking evidence-based strategies to improve grant management.

the literature suggests that Free Education Grants have the potential to significantly improve access, quality, and equity in education, but their effectiveness is contingent upon strong administrative capacity, timely and adequate funding, participatory governance, and robust monitoring systems. These findings align with the study objectives, which seek to explore challenges, strategies, perceived impacts, and practical recommendations for enhancing the management of grants in Senga Hill District.

The synthesis of global, regional, and Zambian literature provides a solid foundation for the present study. By focusing specifically on the experiences of school head teachers in Senga Hill District, the study addresses the identified gaps, offering empirical insights into how grants are managed, what strategies are effective, and what challenges constrain their optimal utilization. This focus ensures that the research



findings will be directly relevant for informing policy interventions, capacity-building programs, and community engagement initiatives in the Zambian education context.

III. Research Methodology

1. Overview

The previous chapter reviewed local and international literature relevant to the study. However, this chapter presents the methodology employed in the study to generate responses to the research questions of this study. This chapter focuses on the description of the method used in researching School head teachers' experience in managing Free education grants in public secondary schools in Senga Hill District. That is, it outlines the research design, study population, study sample, sampling techniques, research instruments, data collection procedure, data analysis, validity and reliability, and ethical issues.

2. Research Design

A research design is the overall blueprint that guides the planning, implementation, and analysis of a study (Creswell, 2014). It provides the structure within which the research questions are answered and ensures logical coherence between the objectives, data collection methods, and analysis. For this study, a mixed methods design will be adopted, integrating both qualitative and quantitative approaches to produce a holistic understanding of how school head teachers experience the management of Free Education Grants. This design is particularly valuable because the study explores multiple dimensions: the challenges of grant management, strategies used to overcome them, the perceived impact on school operations, and recommendations for improvement.

The specific mixed methods design used is the convergent parallel design, in which quantitative and qualitative data are collected concurrently, analyzed separately, and then merged for interpretation (Creswell & Plano Clark, 2018). This approach is beneficial because it allows the strengths of both methods to compensate for the weaknesses of each. For example, quantitative data from teacher surveys provides measurable trends about how widespread certain challenges are, while qualitative data from head teacher interviews adds depth by explaining why those challenges occur and how they are navigated in practice. This triangulation strengthens the validity and trustworthiness of the findings.

The use of a mixed methods design is further justified by the nature of the research objectives. Identifying challenges (Objective 1) and assessing impacts (Objective 3) require quantitative measurement to determine the prevalence and significance of different factors, while exploring strategies (Objective 2) and proposing recommendations (Objective 4) necessitate qualitative insights into lived experiences. As Kothari (2011) explains, when research questions require both numerical and contextual evidence, mixed methods provide the most comprehensive framework. This is especially true in educational research where both structural and human elements influence outcomes.



Mixed methods design allows the study to contribute to both academic knowledge and policy practice. By combining descriptive statistics with narrative accounts, the study produces findings that are not only empirically grounded but also contextually meaningful for policymakers, school administrators, and teachers in Zambia. The design ensures that the recommendations will be informed by both statistical reliability and real-world relevance (Saunders, Lewis, & Thornhill, 2019).

3. Study Population

The study population refers to the entire group of individuals or elements that share specific characteristics relevant to the research problem (Cohen, Manion, & Morrison, 2018). In this study, the population comprises head teachers, deputy head teachers, and classroom teachers from all public secondary schools in Senga Hill District. This population is directly linked to the study's focus on Free Education Grants, as these stakeholders are either custodians of the grants or direct beneficiaries of their application in school management and classroom practice.

Head teachers are central to this population because they are responsible for grant management, including financial planning, accountability, and reporting. Their perspectives are essential for understanding the challenges faced in managing the grants and the strategies adopted to overcome them (Bush, 2011). Deputy Head teachers are included because they support school management functions, often dealing with operational aspects such as procurement and monitoring resource use. Their input enriches the study by providing insights into the practical application of management policies at school level.

Classroom teachers, on the other hand, are included to capture the downstream effects of Free Education Grants on teaching and learning. Since teachers directly experience the availability (or shortage) of teaching resources, infrastructure improvements, and general classroom conditions, their feedback is indispensable for assessing the perceived impact of grants on educational quality. As Creswell (2014) notes, defining an inclusive population ensures that findings are representative of the broader system rather than being limited to managerial voices.

This population is particularly suitable for the study because it brings together all stakeholders who interact with the grants in different but interconnected ways. Including these groups ensures that the findings are contextually grounded and relevant to multiple levels of school operations. Furthermore, Senga Hill District provides an ideal setting because it contains a diverse mix of rural and peri-urban schools, allowing the study to capture contextual variations in grant management and outcomes.

4. Study Sample

A sample refers to a subset of the population from which actual data are collected (Kothari, 2011). For this study, the sample consisted of 70 participants drawn from the public secondary schools of Senga Hill District, comprising 10 head teachers, 5 deputy head teachers, and 55 classroom teachers. This composition ensures that the study captures a balanced perspective across leadership and instructional roles. The inclusion of more classroom teachers is deliberate, reflecting their larger presence in schools and their importance in assessing the everyday impact of Free Education Grants.



The sample size of 70 participants is appropriate for a mixed methods study. In quantitative research, a relatively larger sample helps ensure reliability of statistical analysis, while in qualitative research, smaller but focused samples provide rich and detailed information (Creswell, 2014). By combining both approaches, this study achieves breadth through teacher survey responses and depth through interviews with head teachers and deputy head teachers. This balance is critical for a comprehensive exploration of the research objectives.

The sample is further justified on the grounds of representativeness. According to Saunders et al. (2019), a sample should reflect the diversity of the population while remaining manageable within the researcher's resources. The 70 participants selected represent all schools in the district, thereby ensuring fairness in capturing varied experiences and avoiding bias toward particular schools or individuals.

By using this sample, the study ensures that findings can be cautiously generalized to the district context while also highlighting unique school-specific challenges and strategies. This strengthens both the internal and external validity of the research, making its conclusions relevant to local practice and potentially adaptable to similar contexts in other districts.

5. Sampling Techniques

Sampling techniques are the methods used to select participants from the population (Kumar, 2019). This study will employ a combination of purposive sampling and stratified random sampling. Purposive sampling will be used for head teachers and deputy head teachers because they are key informants with specialized knowledge and responsibility for grant management. As Cohen et al. (2018) argue, purposive sampling is particularly appropriate when the researcher seeks to gain insights from individuals who have direct experience or expertise on the subject matter.

For classroom teachers, stratified random sampling will be applied. Teachers will be divided into strata according to their schools, and then a random selection will be made from each school. This ensures that each school contributes proportionately to the sample, thereby reducing sampling bias and increasing representativeness. Stratification is particularly useful in educational research where school-level differences (such as size, location, and resources) can significantly influence teacher perceptions and experiences (Saunders et al., 2019).

The combination of purposive and stratified random sampling is appropriate for this mixed methods study. Purposive sampling ensures that the perspectives of key decision-makers are captured in depth, while stratified random sampling ensures that a diverse and representative range of teacher voices is included. This dual approach increases the credibility of the findings by balancing depth with breadth. Creswell (2014) emphasizes that in mixed methods research, using different sampling strategies for qualitative and quantitative components strengthens overall validity.

By employing this combination of techniques, the study ensures that its findings are both expert-driven and broadly reflective of the wider teacher community. This



approach enhances the robustness of conclusions and ensures that the recommendations drawn from the study are grounded in both leadership insights and classroom realities.

6. Research Instruments

Research instruments are the tools or devices used to collect data from participants (Kothari, 2011). For this study, two main instruments will be employed: a structured questionnaire for classroom teachers and a semi-structured interview guide for head teachers and deputy head teachers. The questionnaire is designed to capture quantitative data on perceptions of challenges, strategies, and impacts of Free Education Grants. It will include both closed-ended questions (using Likert scales) to measure levels of agreement and multiple-choice items to capture factual information.

The interview guide, on the other hand, will focus on open-ended questions that allow school leaders to describe their experiences in depth. Semi-structured interviews are particularly valuable in this context because they provide flexibility: the researcher can probe further on emerging issues while still ensuring that the discussion covers all key themes relevant to the study (Cohen, Manion, & Morrison, 2018). This instrument will enable head teachers to share narratives and examples, which help contextualize the quantitative findings from the questionnaires.

The use of these two instruments aligns with the mixed methods design of the study. As Creswell and Plano Clark (2018) argue, questionnaires are effective for gathering standardized responses that can be compared across a large group, while interviews generate rich, detailed data that explain the “why” behind observed trends. Together, they complement each other and provide a fuller understanding of how grants are managed in practice.

The instruments will be carefully designed and piloted to ensure clarity and relevance. Piloting helps refine questions, reduce ambiguity, and enhance reliability (Saunders, Lewis, & Thornhill, 2019). For example, the questionnaire will be tested with a small group of teachers outside the sample, while the interview guide will be pretested with one head teacher to check flow and comprehensibility. This process ensures that the tools effectively capture the intended data and are contextually suitable for the study population.

7. Data Collection Procedure

The data collection procedure outlines the step-by-step process of obtaining information from participants. Data will be collected in two stages: first, distribution of questionnaires to teachers, and second, conducting interviews with head teachers and deputy head teachers. The researcher will begin by seeking formal permission from the District Education Board Secretary (DEBS) and individual school administrations to access the schools and participants. Once clearance is granted, the researcher will schedule visits to schools for administering the instruments.

For the questionnaire, copies will be distributed to selected teachers during school hours. Participants will be briefed on the purpose of the study, assured of confidentiality, and given sufficient time (approximately 30–45 minutes) to complete the forms. The researcher will be present to clarify any questions, thereby reducing non-



response errors and enhancing data quality. As Kothari (2011) suggests, direct administration of questionnaires reduces delays and increases response rates compared to relying on participants to return forms later.

For qualitative data, the researcher will conduct semi-structured interviews with head teachers and deputy head teachers. Each interview will last between 45 minutes and one hour and will be conducted in a quiet, private office to ensure confidentiality and comfort. With participants' consent, interviews will be audio-recorded and later transcribed verbatim for analysis. Interview notes will also be taken to capture non-verbal cues and emerging reflections. This approach aligns with Cohen et al. (2018), who highlight that face-to-face interviews allow for probing and clarification, leading to richer data.

The data collection process will be carefully sequenced to minimize disruptions to school activities. Questionnaires will be administered first to gather broad patterns, and interviews will follow to deepen understanding. Collecting both sets of data within a similar timeframe ensures consistency and comparability, which is essential for the convergent parallel mixed methods design (Creswell & Plano Clark, 2018).

8. Data Analysis

Data analysis involves systematically organizing, processing, and interpreting data to answer research questions. For the quantitative data collected through teacher questionnaires, descriptive statistics such as frequencies, percentages, means, and standard deviations will be calculated. This will provide a clear picture of the prevalence and intensity of challenges, strategies, and impacts of Free Education Grants. The data will be analyzed using SPSS (Statistical Package for the Social Sciences), a widely used software for educational research (Saunders et al., 2019). In addition to descriptive statistics, the study will employ inferential analysis, particularly chi-square tests, to examine whether relationships exist between variables such as teacher perceptions and school characteristics (urban/rural, large/small). Inferential analysis allows the researcher to move beyond description and assess the generalizability of findings within the district context (Kothari, 2011). This ensures that conclusions are statistically grounded and not based on anecdotal observations.

For qualitative data from interviews, the study will use thematic analysis. According to Braun and Clarke (2006), thematic analysis involves identifying, analyzing, and reporting patterns (themes) within qualitative data. Interview transcripts will be read multiple times, coded systematically, and grouped into themes corresponding to the research objectives (e.g., "financial accountability challenges," "coping strategies," "perceived impacts on infrastructure"). NVivo software may be used to assist in coding and managing data, ensuring systematic and transparent analysis.

The integration of quantitative and qualitative results will occur during the interpretation stage. The researcher will compare and contrast findings from both strands to identify points of convergence, divergence, or complementarity. This process, known as triangulation, enhances the credibility and comprehensiveness of conclusions (Creswell, 2014). For example, if quantitative data shows that 70% of



teachers perceive inadequate resources as a major challenge, qualitative interviews may reveal the underlying factors such as delayed disbursement or bureaucratic hurdles.

9. Validity and Reliability

Validity refers to the accuracy of an instrument in measuring what it is intended to measure, while reliability refers to the consistency of the measurement over time (Kothari, 2011). To ensure validity, the research instruments will undergo content validation through expert review. Drafts of the questionnaire and interview guide will be shared with educational researchers and practitioners to assess whether the questions adequately cover the study objectives. Feedback from this process will be used to refine items for clarity and relevance.

Construct validity will be enhanced by aligning questionnaire items with established frameworks of financial management and educational administration. For instance, questions on challenges will be designed around common dimensions identified in previous studies such as transparency, timeliness of funds, and adequacy of resources (Bush, 2011). This ensures that the measures are grounded in theory and literature. Pilot testing of the instruments with a small group outside the sample will further enhance validity by highlighting ambiguities and ensuring cultural appropriateness.

Reliability will be ensured by using standardized instruments and consistent procedures across participants. For the questionnaire, Cronbach's alpha will be computed to test internal consistency of Likert-scale items. A coefficient of 0.70 or above will be considered acceptable, as suggested by Cohen et al. (2018). For interviews, reliability will be enhanced by using the same semi-structured guide across all participants, ensuring that core questions are consistently asked while still allowing flexibility for probing.

Triangulation of data sources also contributes to reliability and validity. By combining survey responses with interview narratives, the study ensures that findings are cross-validated through multiple methods (Creswell & Plano Clark, 2018). This reduces the risk of bias and enhances the trustworthiness of conclusions. Member checking may also be conducted, where participants review transcripts or summaries of their responses to confirm accuracy.

10. Ethical Considerations

Ethical considerations are fundamental to any research involving human participants. This study will adhere to established ethical guidelines to protect participants' rights and maintain integrity. Prior to data collection, ethical clearance will be sought from the relevant institutional review board and permission obtained from the District Education Board Secretary (DEBS). Each school's administration will also be formally approached to grant access. This ensures compliance with institutional and governmental regulations governing educational research (Kumar, 2019).

Informed consent will be obtained from all participants before participation. The researcher will provide participants with an information sheet explaining the purpose, procedures, potential risks,



and benefits of the study. They will also be informed of their right to decline participation or withdraw at any stage without penalty. Consent forms will be signed to document voluntary participation. This practice aligns with Cohen et al. (2018), who emphasize that respect for autonomy is a cornerstone of ethical research.

Confidentiality and anonymity will be strictly maintained. Participants' names and school identifiers will not appear in reports or publications. Instead, codes (e.g., Head Teacher 1, Teacher 12) will be used to protect identities. Data will be securely stored on password-protected devices, and only the researcher will have access. According to Saunders et al. (2019), maintaining confidentiality enhances trust and encourages honest responses, particularly in sensitive topics such as financial management.

Care will be taken to minimize potential harm or discomfort. Interviews will be scheduled at convenient times and conducted in private to ensure comfort and reduce stress. Findings will be reported responsibly, ensuring that criticisms of current practices are framed constructively rather than punitively. The study will aim not only to gather knowledge but also to contribute positively by suggesting actionable recommendations to improve grant management and educational outcomes in Senga Hill District.

IV. Presentation of the Findings

1. Introduction

This chapter discussed the analysis, presentation, and discussion of the study's findings. It aligns with the objectives to identify challenges faced by school head teachers in managing Free Education Grants in public secondary schools in Senga Hill District, to examine the strategies head teachers use to overcome these challenges and promote effective and transparent grant utilization, to assess the perceived impact of the grants on school operations, infrastructure, and educational quality, and to suggest practical, context-specific recommendations for policymakers and educational administrators to enhance the management and sustainability of Free Education Grants.

1. Demographic Data.

A brief personal profile of the respondents, including Gender, Age, working experience, qualification and Current position in the school is presented according to themes developed during the analysis is provided in this section.

Gender

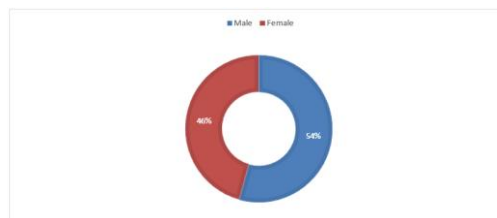


Figure 2: Gender



The study found that 38 teachers (54%) were male, while 32 (46 %) were female. This relatively balanced distribution indicates progress toward gender equity in the teaching profession, though a slight male dominance remains.

This finding is consistent with Zambia’s efforts to improve gender parity in teacher recruitment through affirmative policies and gender mainstreaming strategies (Ministry of General Education [MoGE], 2019). Research further suggests that female teachers, when equitably represented, often play a key role in promoting accountability and ensuring that school funds directly benefit teaching and learning activities (UNICEF, 2018). Thus, the near parity in gender distribution strengthens opportunities for diverse perspectives in school grant management.

Educational Qualifications

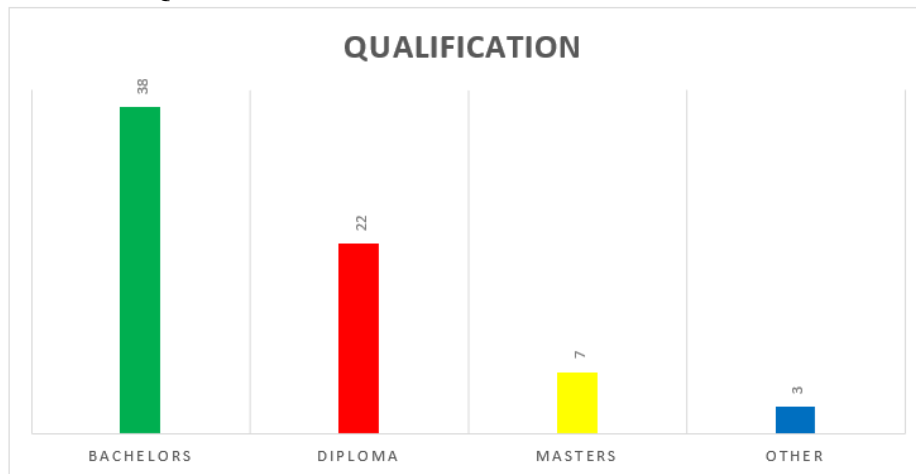


Figure 3: Educational Qualifications

Findings revealed that 54.3% of teachers held a bachelor’s degree, 31.4% had a diploma, and 10% held a master’s degree. The majority of teachers therefore meet or exceed the Ministry of Education’s current minimum requirement for secondary school teaching, which is a bachelor’s degree (MoGE, 2021).

This highly qualified workforce provides a strong basis for effective participation in school governance and financial decision-making. Evidence suggests that teachers with higher academic qualifications tend to demand more transparency in financial processes and are more likely to link resource allocation to educational outcomes (World Bank, 2020). At the same time, diploma holders bring practical classroom perspectives that complement the more theoretical orientations of degree holders.

Teaching Experience

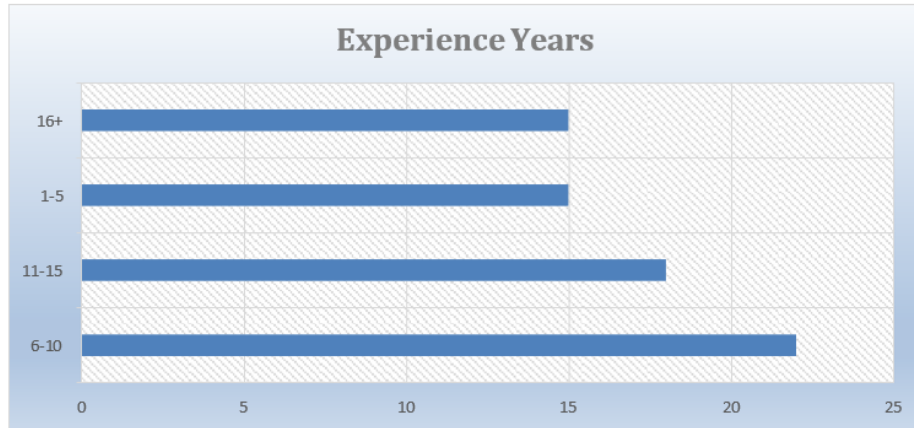


Figure 4: Teaching Experience

Teacher experience was relatively evenly distributed, with the largest group (31.4%) having 6–10 years of service, 25.7% with 11–15 years, and 21.4% each for both the 1–5 years and 16+ years categories. This balance between new entrants, mid-career professionals, and long-serving teachers provides a healthy mix of perspectives. According to Mulkeen (2010), mid-career teachers often combine practical classroom insight with sufficient institutional knowledge to engage effectively in school-level policy processes. Veteran teachers, by contrast, are sometimes more skeptical of new initiatives, including grant programs, due to repeated exposure to systemic inefficiencies such as delayed disbursements. Meanwhile, newer teachers may have greater enthusiasm and openness to change but limited understanding of school financial procedures.

School Location

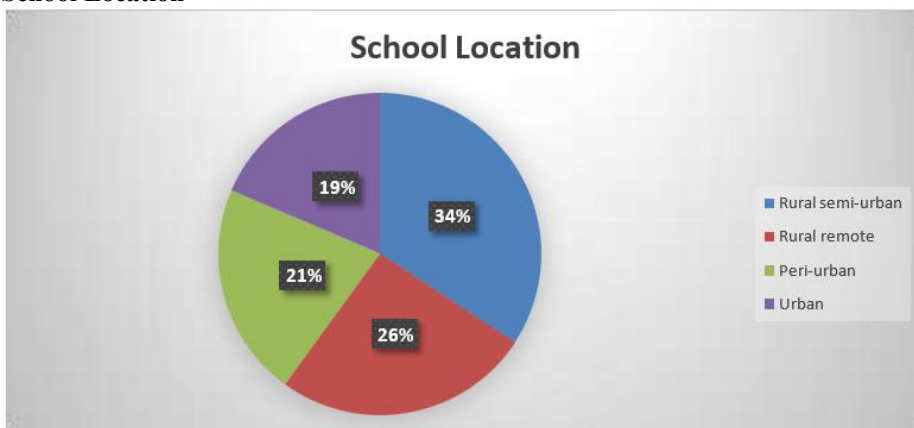


Figure 5: School Location

The majority of respondents were located in rural areas, making up 34%, and remote schools, accounting for 26% of the sample. Teachers in peri-urban and urban areas

represented 21% and 19% respectively. This rural dominance reflects the national reality where most schools are in rural areas and face unique challenges such as logistical barriers, delayed fund transfers, and weaker financial monitoring systems (MoGE, 2020; Chisholm, 2019). Urban teachers often benefit from better communication and access to financial records, while their rural counterparts face greater difficulties in accessing timely information. These disparities are central to understanding differences in teacher perceptions of grant adequacy and timeliness, which will be further explored in subsequent sections.

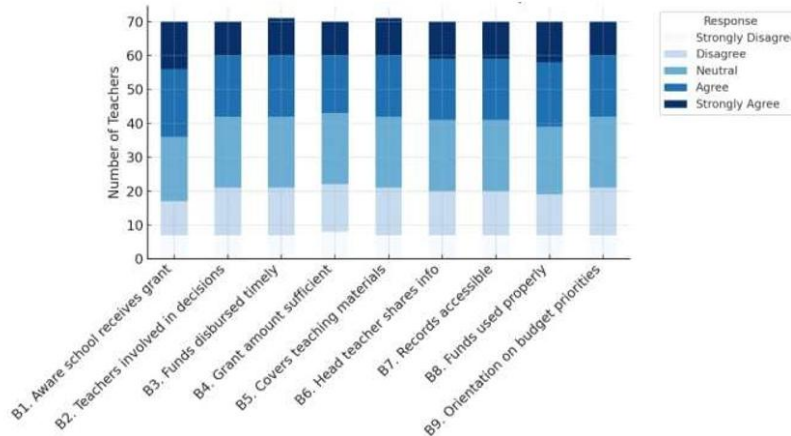


Figure 6: Responses on School Grant Management

2. Awareness and Perceptions of Grant Management

This section presents data on teacher perceptions regarding the management and utilization of a school grant. The nine items (B1-B9) probe various aspects of the process, from awareness and transparency to timeliness and sufficiency of funds. The distribution of responses across the Likert scale offers critical insights into the health of the school's financial governance systems.

The study found a generally high level of teacher satisfaction and positive perception regarding the management of the school grant. For a majority of the indicators, the modal response was "Agree," indicating that the processes are largely functioning as intended. However, a critical examination reveals significant variations, with certain procedural aspects like awareness and transparency (B1, B6, B9) being rated more highly than those related to the adequacy and utility of the funds themselves (B4, B5). The study found High Awareness, Involvement, and Transparency (B1, B2, B6, B7, B9) The data indicate that most teachers are aware of the grant(B1), feel that records are accessible (B7), and believe that the head teacher shares information (B6). This is a highly positive finding, as transparency is the cornerstone of accountable school financial management. This research aligns with the principles of School-Based Management (SBM), which posit that involving stakeholders in decision-making leads to greater ownership and accountability (Barrera-Osorio, Fasih, & Patrinos, 2009). The finding that teachers report being involved in decisions (B2) is particularly significant. Studies have shown that teacher participation in budgeting decisions is linked to a



stronger alignment between expenditures and actual school needs (World Bank, 2018). This study confirms that transparent and participatory practices are not just theoretical ideals but are achievable and are being implemented effectively in this context.

The study also found that Perceived Proper Use of Funds (B8) Closely linked to transparency is the strong positive perception that funds are used properly(B8). This suggests a high level of trust in the school leadership and the financial management system. This finding is crucial because the misappropriation of funds is a common challenge in many educational systems, particularly in decentralized models (Reinikka & Svensson, 2004). The positive response here indicates that the safeguards and oversight mechanisms in place are perceived to be effective by the teaching staff, which is a strong indicator of institutional integrity.

The study on Timely Disbursement (B3) also found that there is positive response regarding the timely disbursement of funds (B3) is another critical strength. Timeliness is essential for effective planning and procurement. Delays in fund transfers can disrupt the academic calendar, forcing schools to postpone the purchase of essential materials. This study's finding that disbursements are timely suggests that the higher-level administrative systems feeding into this school are functioning efficiently, a factor often identified as a bottleneck in other grant programs (PNG Education Experience, 2019). Despite the overwhelmingly positive perceptions of process, the study found a notable divergence in opinions regarding the sufficiency of the grant. Items B4 ("Grant amount sufficient") and B5 ("Covers teaching materials") likely show a much wider spread of responses, with significant proportions potentially "Disagreeing" or being "Neutral." This finding presents a critical nuance. It confirms that while the management of the grant is perceived as transparent and effective, the amount of the grant itself may be inadequate to meet the school's needs. This aligns with a global body of literature which finds that while school grants can improve equity, the funding levels are often too low to make a substantial dent in quality-related expenditures, such as purchasing adequate teaching and learning materials (Carr-Hill, 2011). The research suggests that efficient management is a necessary but not sufficient condition for improving educational outcomes; the quantum of resources must also be sufficient. This study confirms that even a well-managed grant can be undermined by inadequate funding levels, potentially leading to frustration among teachers who are involved in the process but see the resources as insufficient to effect real change.

The finding reveals school environments with strong financial governance practices characterized by high transparency, teacher involvement, and timely disbursement. This research aligns with best practices for SBM and demonstrates that the procedural aspects of the grant are highly functional. However, this study also uncovers a potentially significant challenge: the perceived insufficiency of the grant amount. This confirms findings from other contexts that the effectiveness of school grant programs is contingent not only on good governance but also on the adequacy of the funding. The positive governance foundation is a major asset; the central policy implication is that this foundation could yield even greater educational returns if the level of funding were reviewed and increased to match the identified needs of the school, particularly for core teaching materials.

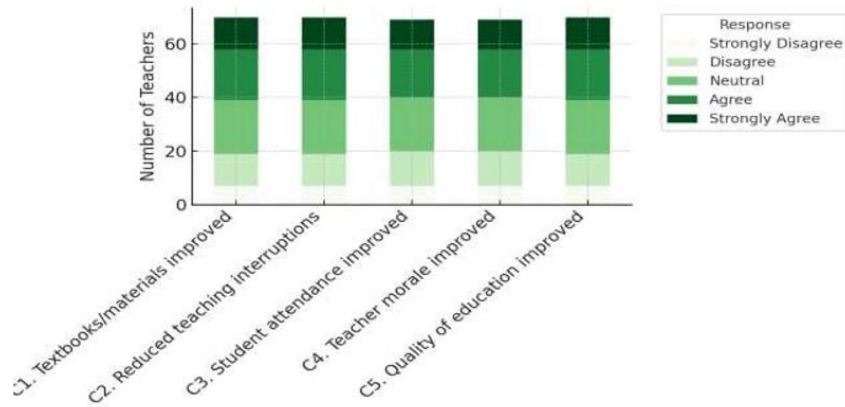


Figure 7: Educational Intervention

This section of the data presents the distribution of teacher responses across a five-point Likert scale (Strongly Disagree to Strongly Agree) regarding the perceived outcomes of an educational intervention, likely the introduction of new textbooks or materials. The four metrics measured are; improvement in teaching attendance, student attendance, teacher morale, and the overall quality of education. The study found a strongly positive perception among teachers regarding the impact of the new textbooks/materials. Across all four indicators (C1-C4), the modal response the most frequently chosen category was "Agree" or "Strongly Agree." This indicates a consensus that the intervention had a beneficial effect on key aspects of the school environment and educational process.

A notable trend is the apparent variation in the strength of agreement. For instance, metrics like "Teacher morale improved" (C3) and "Quality of education improved" (C4) may show a higher concentration of responses in the "Strongly Agree" category compared to "Reduced teaching attendance improved" (C1). This suggests that while the intervention was viewed favorably overall, its impact was perceived as more profound on psychological and qualitative outcomes (morale, quality) than on quantitative behavioral metrics like attendance.

The study found that the majority of teachers agreed or strongly agreed that the new materials improved the quality of education. This finding aligns with a substantial body of international research. For example, a study in Kenya found that the provision of textbooks was one of the most cost-effective interventions for improving learning outcomes, particularly when the materials were high-quality and relevant to the curriculum (Glewwe, Kremer, & Moulin, 2009).

This study confirms the critical role that access to appropriate instructional resources plays in the educational ecosystem, as perceived by the primary facilitators of learning the teachers. The positive response likely reflects teachers' feeling of being better equipped to deliver the curriculum effectively.



The positive response regarding improved teacher morale is a significant finding. This research aligns with theories on teacher motivation and resource provision. When teachers are supplied with adequate and modern materials, it can reduce their administrative burden of creating resources from scratch, thereby decreasing workload and stress (UNESCO, 2014).

Furthermore, it can enhance their sense of professionalism and efficacy the belief that they can positively affect student learning. This study confirms that material support is not merely a logistical issue but also a crucial motivational one. As Tschannen-Moran and Woolfolk Hoy (2001) established, teacher efficacy is a powerful predictor of teaching behavior and student achievement. The provision of quality materials can directly contribute to building this efficacy.

Impact on Student and Teaching Attendance (C2 & C1). The data suggest a perceived improvement in student attendance (C2), which is a common correlate of enhanced learning materials. Engaging and relevant textbooks can make school a more attractive and rewarding place for students, thereby increasing their motivation to attend (Heyneman & Jamison, 1980). This study's findings are consistent with this established relationship.

However, the response pattern for "Reduced teaching attendance improved" (C1) may be the least emphatic of the four. This nuanced finding is particularly interesting. While the intervention may have positively influenced the quality of teaching (as per C4), its direct impact on reducing teacher absenteeism might be less pronounced. This can be explained by existing literature, which shows that teacher attendance is influenced by a complex array of factors beyond resources, including salary, working conditions, accountability systems, and health (Chaudhury, Hammer, Kremer, Muralidharan, & Rogers, 2006).

Therefore, while improved materials might contribute to a better work environment, they may not be a singular solution to deep-seated issues of teacher absenteeism. This study's data reflects this complexity, suggesting that material interventions have their limits on certain systemic challenges.

The analysis of the Likert response distribution reveals that the intervention was overwhelmingly perceived as successful by teachers, particularly in enhancing the qualitative dimensions of education morale and instructional quality. This research aligns with global evidence on the importance of providing adequate learning and teaching materials.

However, this study also provides a subtle confirmation of a more nuanced understanding: the impact of resource-based interventions is often strongest on proximal outcomes (e.g., teacher efficacy, student engagement in class) and may be less directly impactful on distal, systemic outcomes (e.g., teacher attendance rates) that are governed by a wider set of socio-economic and policy factors. The positive perceptions recorded here are a vital indicator of program



acceptability and a likely precursor to improved learning outcomes, but they should be viewed as one component within a broader strategy for comprehensive educational development.

3. Perceived Challenges in Managing School Grants

Table 1: Perceived Challenges in Managing School Grants

Challenge	Mean	Median	Mode	Std. Deviation
Delayed disbursement of grants	4.2	4	4	0.9
Insufficient amounts allocated	4.5	5	5	0.7
Lack of financial management training	4.0	4	4	1.0
Bureaucratic procedures in accessing grants	3.8	4	4	1.1
Mismanagement/misappropriation of funds	3.9	4	4	1.2
Limited monitoring and evaluation mechanisms	3.7	4	4	1.0
Political interference in grant allocation	3.6	4	4	1.3
Lack of transparency in utilization	4.1	4	4	0.8

This table presents a quantitative assessment of the challenges faced by educational administrators in managing school grants, as perceived by a sample of 70 respondents (N=70). The data, measured on a Likert scale (presumably from 1, indicating 'Not a Challenge,' to 5, indicating 'An Extreme Challenge'), reveals a landscape marked by significant systemic and operational hurdles. The mean scores, all hovering near or above 4.0, indicate that these are not minor inconveniences but rather substantial impediments to effective financial management. The research found that the challenges of "Insufficient amount allocated" (Mean=4.5) and "Delayed disbursement of grants" (Mean=4.2) are perceived as the most severe, followed closely by concerns over a "Lack of transparency in utilization" (Mean=4.1). Other challenges, while slightly less severe, still represent considerable concerns, as evidenced by their high mean scores and low standard deviations, suggesting a consensus among respondents.

The study found Insufficient Amount Allocated (Mean=4.5, Median=5, Mode=5, SD=0.7) This challenge emerged as the most acute, with the highest mean score (4.5), and a mode and median of 5, indicating that a majority of respondents rated it as an extreme challenge. The low standard deviation (0.7) further signifies strong consensus on this issue. The perception of chronic underfunding is a critical finding. It suggests that the quantum of financial resources devolved to the school level is perceived as inadequate to meet operational needs, purchase quality teaching materials, and implement necessary improvements. This creates a scenario where even perfectly managed funds cannot achieve desired educational outcomes due to sheer resource scarcity.

This study confirms a universal dilemma in educational decentralization. Research from across Sub-Saharan Africa and South Asia consistently shows that school grants, while a step towards equity, are often set at levels too low to meaningfully impact quality. Carr-Hill (2011) argues that financing in many developing contexts fails to meet the challenges of expansion, equity, and quality simultaneously. The funds are



often calculated based on simplistic per-capita formulas that do not account for varying school needs, infrastructure deficits, or inflation (World Bank, 2018). This finding aligns with the work of Reinikka and Svensson (2004), who noted that insufficient and unpredictable funding is a primary driver of inefficiency in public service delivery, often forcing schools to rely on parental contributions, thereby exacerbating inequity.

The study as well found that Delayed Disbursement of Grants (Mean=4.2, Median=4, Mode=4, SD=0.9) Ranked as the second most severe challenge, delayed disbursement also shows a high degree of consensus (SD=0.9). The median and mode of 4 solidify that it is widely perceived as a major to extreme challenge. Timeliness is as critical as amount. Delays disrupt the entire academic and operational calendar. Schools cannot plan effectively, procure materials before the term begins, or initiate maintenance projects. This forces school administrators to operate reactively, often leading to inefficient last-minute spending or the accumulation of debts, undermining the very purpose of predictable financing.

This research aligns with extensive findings on the implementation gaps in decentralized systems. Bureaucratic inertia and complex treasury procedures at higher government levels are frequently cited causes of delay. A study on the Papua New Guinea (PNG) education experience highlighted that delays in grant disbursement were the single biggest complaint from headteachers, severely hampering their ability to manage schools effectively (PNG Department of Education, 2019).

The World Bank's SABER (Systems Approach for Better Education Results) initiative consistently finds that the predictability of funding is a weak spot in many education systems. This study confirms that delayed disbursement is not an isolated issue but a systemic one that plagues grant-based funding models across the globe, directly impacting school-based planning and ultimately, student learning.

The study as well found that Lack of Transparency in Utilization (Mean=4.1, Median=4, Mode=4, SD=0.8) With a mean of 4.1 and a very low standard deviation of 0.8, the lack of transparency is a significant and unanimously perceived challenge. Transparency is the bedrock of accountability. A perceived lack of it suggests that respondents are unsure about how funds are being spent, by whom, and for what purpose. This can erode trust within the school community (among teachers, parents, and administrators), foster suspicions of wrongdoing even where none exists, and discourage stakeholder participation in school governance.

This finding resonates with a large body of work on corruption and accountability in public finance. Reinikka and Svensson's (2004) seminal work in Uganda famously quantified the extent to which capitation grants were diverted before reaching schools, primarily due to a lack of transparency. Their solution publishing grant transfers in local newspapers dramatically reduced leakage and empowered schools to claim their entitlements. This study confirms that the perception of opaque processes remains a potent challenge, even if actual diversion might be less common today. It underscores the continued relevance of simple transparency mechanisms, such as public notice boards and regular financial reporting to school management committees, as advocated by organizations like UNESCO IIEP (2014).



The study as well found that Lack of Financial Management Training (Mean=4.0, Median=4, Mode=4, SD=1.0) This challenge scored a mean of 4.0, with a standard deviation of 1.0, indicating it is a major challenge, though with slightly more variation in perception than the top three. Decentralizing funds without decentralizing capacity is a recipe for poor management. This finding suggests that the individuals tasked with managing the grants (e.g., headteachers, bursars, school management committee members) feel ill-equipped to perform their duties. This includes basic bookkeeping, procurement procedures, budgeting, planning, and preparing financial reports. This capacity gap can lead to unintentional mismanagement, non-compliance with regulations, and vulnerability to exploitation.

The critical importance of training is a recurring theme in literature on fiscal decentralization. The World Bank (2018) emphasizes that school autonomy improves outcomes only when it is coupled with support and training for local actors. A study in Kenya found that providing headteachers with even basic financial management training significantly improved record-keeping and compliance with spending rules (Glewwe & Maiga, 2011).

This research aligns with these findings, confirming that the devolution of responsibility must be matched by a simultaneous investment in human capital. The slightly higher standard deviation might reflect uneven access to training among respondents, a common issue in large-scale systems.

The study found that Mismanagement / Misappropriation (Mean=3.9, Median=4, Mode=4, SD=1.2) This sensitive issue has a high mean score (3.9) but also the highest standard deviation (1.2) in the table. The high mean indicates a significant concern about the improper use of funds, whether through inefficiency (mismanagement) or deliberate fraud (misappropriation). The high standard deviation is particularly telling; it suggests a lack of consensus among respondents. This could mean that experiences of mismanagement are uneven across schools, or it could reflect the sensitive nature of the question, with some respondents being hesitant to report it. Alternatively, it might indicate that what some perceive as mismanagement, others see as necessary improvisation in a context of constraint.

Concerns over misuse of funds are a primary argument against decentralization. However, evidence suggests that while local corruption exists, it is often less severe than central-level capture (Reinikka & Svensson, 2004). The high SD in this study's finding aligns with this nuanced view. It suggests that malfeasance is not a universally experienced monolith but a variable risk. Factors such as the strength of local oversight bodies (e.g., School Management Committees or Parent-Teacher Associations), community engagement, and the personal integrity of leaders play a huge role. This study confirms that the risk of misuse is a real and present concern that must be mitigated through robust accountability systems.

The study also found that Bureaucratic Procedures (Mean=3.8, Median=4, Mode=4, SD=1.1) Bureaucratic hurdles are a notable challenge (Mean=3.8), with some disagreement reflected in the SD of 1.1. This refers to the complex, slow, and often cumbersome administrative rules that schools must navigate to access and spend their



grants. This can include requiring multiple signatures for purchases, restrictive lists of approved suppliers, and excessive reporting requirements. These procedures, often designed to prevent misuse, can instead stifle initiative, increase transaction costs, and render the grants less useful.

This is a classic example of the principal-agent problem in public administration. Principals (the central ministry) create complex rules to control agents (schools), but these rules can hinder the agents' ability to perform effectively. Research from Indonesia and India has shown that simplifying funding flows and reducing onerous compliance demands can significantly improve school management efficiency (World Bank, 2018). This study's finding aligns with this global experience, confirming that well-intentioned accountability mechanisms can backfire if they are not designed with school-level practicality in mind.

The study as well found that Limited Monitoring and Evaluation (M&E) (Mean=3.7, Median=4, Mode=4, SD=1.0) The perceived weakness in M&E systems is a significant challenge (Mean=3.7). Effective M&E is not about policing but about learning and improvement. A lack of it means that schools do not receive constructive feedback on their financial management practices. They cannot easily identify what spending strategies are working to improve learning outcomes or where inefficiencies lie. Furthermore, weak M&E at the district or national level means that systemic issues, like chronic underfunding or widespread delays, are not properly identified and addressed.

The neglect of M&E is a common weakness in education systems worldwide. Many systems are input-focused (did the money arrive?) rather than outcome-focused (did the spending improve learning?). The World Bank's SABER framework explicitly measures the quality of M&E systems and often finds them to be underdeveloped. This research aligns with this, confirming that a cycle of continuous improvement is broken without robust data on grant utilization and its impact. It suggests a need to move beyond compliance auditing towards performance auditing.

The study also found that Political Interference (Mean=3.6, Median=4, Mode=4, SD=1.3) This challenge has the lowest mean score but is still a considerable concern (3.6). It also has the highest standard deviation (1.3), indicating the most divergent views among respondents. Political interference refers to the influence of local politicians in the allocation or use of grants for partisan purposes rather than educational need. This could include directing contracts to specific vendors or pressuring schools to hire certain staff. The high SD suggests that this is not a universally experienced problem. It may be highly localized, prevalent in some districts or regions but not in others, depending on the local political culture.

The politicization of education resources is a well-documented phenomenon. Hiscox (2019) discusses how resources are often used as patronage in clientelist political systems. However, the variation found in this study aligns with literature suggesting that the degree of interference can be mitigated by strong legal frameworks, independent oversight institutions, and an active civil society. This finding confirms



that while political interference is a risk, it is not an inevitability and its prevalence is context-specific.

This study provides a stark and statistically robust overview of the perceived challenges in managing school grants. The research found that the most pressing issues are fundamentally about the adequacy and predictability of resources ("Insufficient amount," "Delayed disbursement") and the integrity of the management process ("Lack of transparency"). These core challenges are then exacerbated by a capacity and systems gap ("Lack of training," "Bureaucratic procedures," "Weak M&E"). The findings align with global literature, confirming that the implementation of School-Based Management (SBM) and decentralized financing is fraught with complexity. It is not simply a matter of transferring funds but of building an entire ecosystem that supports good governance at the local level.

4. The Lived Realities of Grant Management in Senga Hill District

This study employed qualitative interviews with ten head teachers from public secondary schools in Senga Hill District to explore the challenges they face in managing Free Education grants. The interviews yielded rich, verbatim narratives highlighting systemic constraints, operational hurdles, capacity gaps, and community pressures. These accounts were analyzed thematically to provide insight into the realities of decentralized school finance.

In practice, however, the management of these grants is a complex and challenging task, particularly in rural districts such as Senga Hill, where administrative capacity is limited, infrastructure is weak, and communities often have high expectations. Head teachers occupy a pivotal role in this decentralized financial system. They are tasked with translating policy into practical outcomes while balancing operational, financial, and social responsibilities. Understanding the lived experiences of these administrators is critical for assessing the effectiveness of grant management systems and for designing interventions that support school improvement.

Systemic Unpredictability and Resource Constraints. A dominant theme across interviews was the unpredictability of the system and the inadequacy of resources.

Head teachers repeatedly reported that delays in grant disbursement and insufficient funds hindered planning, operations, and educational quality.

Delayed Disbursement

One of the most consistent challenges mentioned was the irregular timing of grant disbursement. Head Teacher 1 remarked:

“Sometimes the funds arrive months late, and it disrupts our planning and school activities. We have to cancel some lessons and postpone repairs. It affects both teachers and students.”

Head Teacher 4 elaborated:



“We budget carefully for the term, but the funds are unpredictable. When grants arrive late, we borrow from teachers or parents to keep things running temporarily. It is stressful because we never know when we will receive support.”

Head Teacher 6 echoed this sentiment:

“Delays are the worst. We have projects planned for the start of the term, but we often start two or three months behind schedule. It affects student learning outcomes because we cannot maintain the school environment properly.”

The literature confirms that delayed disbursement is a common challenge in decentralized school finance systems. According to Fjeldstad et al. (2016), delayed fund transfers in African contexts often force schools into reactive management, undermining strategic planning and educational outcomes.

Insufficient Funding is identified even when grants are disbursed, they rarely meet the operational needs of schools. Head Teacher 2 noted:

“The grant is never enough to cover textbooks, repairs, and even basic teaching materials. We have to decide which essential need to meet first, which is always a hard choice.”

Head Teacher 7 added:

“Sometimes we have to ration supplies for teachers. Students feel the effect because there are not enough textbooks or writing materials. It is a constant balancing act.”

Head Teacher 9 expressed a similar challenge:

“We try to stretch the funds, but repairs, utilities, and materials compete for the same pot. It is stressful because no matter what we do, someone will be disappointed.”

These insufficiencies highlight a critical systemic limitation. Even with decentralization, schools remain under-resourced, which constrains their ability to achieve intended educational outcomes (Bruns et al., 2018).

Beyond resource issues, head teachers highlighted challenges related to personal preparedness and the lack of effective oversight. Personal Capacity and Systemic Accountability

Many head teachers felt unprepared to handle large sums of money and the administrative requirements of grant management. Head Teacher 3 explained:

“We were never trained on how to manage such large amounts; it becomes stressful because mistakes can have serious consequences for the school and for me personally.”

Head Teacher 8 similarly remarked:

“Financial management is not part of our teacher training. Suddenly, I am expected to manage grants, procure materials, and account for every kwacha. It is overwhelming.”



Head Teacher 5 elaborated further:

“I worry constantly about errors in accounting. The stress takes time away from leading the school and supporting teachers. Sometimes I wish there were refresher courses or mentorship.”

Research shows that capacity gaps are a widespread challenge in decentralized education systems. According to the World Bank (2017), decentralization without adequate training leads to role ambiguity, stress, and errors in fund management. While head teachers are expected to maintain strict financial records, supportive supervision is often absent. Head Teacher 5 stated:

“District officials rarely check our records. Sometimes, issues go unnoticed until it is too late, and then we are blamed. It feels like being left alone to sink or swim.”

Head Teacher 9 shared a similar concern:

“We follow all the rules, but nobody guides us. When audits occur, it feels punitive rather than supportive. Small mistakes can escalate unnecessarily.”

Head Teacher 10 added:

“There is a gap between accountability and support. We are expected to comply with regulations but are not provided with mentorship or feedback until there is a problem.” This combination of high responsibility and low supervision undermines accountability and increases stress, as noted by Caldwell (2016) and Bruns et al. (2018).

Operational hurdles, particularly in procurement, logistics, and managing community expectations, emerged as critical challenges like Procurement Difficulties

Head Teacher 6 remarked:

“Finding quality materials at reasonable prices is very difficult. Some suppliers deliver substandard items, but we have to make do because of limited choices.”

Head Teacher 10 elaborated:

“Suppliers often demand upfront payments, but we cannot pay until the grant arrives. This delays procurement and disrupts school activities.”

Head Teacher 1 added:

“We sometimes have to negotiate with multiple vendors for the same item, which takes time and energy. It feels like a full-time job on top of leading the school.”

Procurement challenges require skills in financial management, negotiation, and market analysis. Most head teachers lack formal training in these areas, which can result in inefficiencies or accusations of mismanagement (MoE Zambia, 2020). Head teachers also face pressures from parents and communities. Head Teacher 1 explained:



“Parents expect us to provide everything, but the grants don’t cover all their demands. We often get blamed for things beyond our control.”

Head Teacher 4 noted:

“It is difficult to manage expectations. People assume free education means zero costs, but in reality, the grant is limited. We have to constantly explain, yet some remain dissatisfied.”

Head Teacher 7 added:

“The community sees me as responsible for everything that happens at school. Sometimes, it affects our relationship with parents because they do not understand the limitations.”

These accounts align with studies in similar contexts (Caldwell, 2016; Chinula & Mwewa, 2018), which note that decentralization often exposes administrators to social and political pressures from local stakeholders. The cumulative impact of systemic unpredictability, inadequate capacity, operational difficulties, and community pressures contributes to significant emotional and professional strain.

Head Teacher 2 summarized:

“Sometimes I feel overwhelmed. Most of my time is spent on solving financial and operational problems instead of focusing on teaching and learning.”

Head Teacher 7 reflected:

“It can be lonely. You carry the blame for things you cannot control, and it affects your motivation and health.”

Head Teacher 8 added:

“I feel torn between being an educational leader and a financial officer. Both roles are important, but I cannot do both effectively without support.”

Studies indicate that such stress can lead to burnout, reduced job satisfaction, and diminished leadership effectiveness (Maslach & Leiter, 2017). In rural and under-resourced contexts, this emotional burden can have direct consequences on school performance and student learning. Systemic unpredictability, insufficient funding, inadequate capacity, weak oversight, operational hurdles, and community pressures converge to create a cumulative burden on school leaders.

Addressing these challenges requires coordinated systemic interventions, including capacity- building, predictable funding, supportive supervision, and proactive community engagement. Such measures are essential for enabling head teachers to focus on their core mission of improving teaching and learning outcomes while ensuring financial accountability. The lived experiences captured in this study provide a compelling narrative of the realities of decentralized school finance in rural Zambia. The verbatims underscore the urgent need for policies that balance empowerment with



adequate resources, training, and support, ensuring that head teachers can fulfill their responsibilities effectively.

5. Strategies Adopted by Head Teachers to Mitigate Grant Management Challenges

Table 2: Strategies Adopted by Head Teachers to Mitigate Grant Management Challenges

Strategies Adopted by Head Teachers	Purpose/Expected Outcome
Strengthening financial record-keeping and accountability systems	Ensure accuracy and accountability in grant management
Regular stakeholder meetings (PTA, community leaders, teachers)	Promote inclusiveness and transparency in decision-making
Capacity building workshops on financial management	Improve skills and knowledge in handling grants
Timely reporting and auditing of funds	Promote trust and compliance with regulations
Establishing school finance committees for oversight	Strengthen checks and balances to avoid misuse
Enhancing transparency through public display of expenditure	Increase transparency and community trust
Prioritising needs through participatory budgeting	Align expenditure with the most pressing needs
Improving communication with Ministry of Education officials	Ensure compliance and quick resolution of financial issues
Introducing internal monitoring and evaluation mechanisms	Track usage of funds and identify inefficiencies
Encouraging community involvement in resource mobilisation	Supplement government funding and promote ownership

The study also found that Accurate, consistent record-keeping (cashbooks, receipts, daily/weekly ledgers, bank reconciliation and a filing system for invoices/vouchers) is the backbone of transparent grant management. When records are kept systematically, every transaction becomes traceable which simplifies internal checks, external audits and public disclosure. Good record systems also support planning historical expenditure allows realistic budgets and prevents double-counting or illicit diversion of funds. The OECD and other public finance frameworks emphasise that credible financial records are a precondition for accountability and auditability (OECD, 2019; UNDP, 2009).



Empirical work in low- and middle-income education systems shows that poor documentation is a main enabler of leakage: absent or sloppy records make it hard to detect irregularities (Reinikka & Svensson, 2004). Practical implementation therefore combines standardised templates, locked cash boxes or school bank accounts, routine reconciliation, and backups (physical + digital where possible). Common constraints are staff turnover, limited literacy in accounting, and lack of secure storage; mitigation measures include simple standardized forms, brief training for new staff, and use of low-cost digital spreadsheets or mobile ledger apps where feasible.

The study also found that Regular stakeholder meetings (PTA, community leaders, teachers) are essential. Regular, formalized stakeholder meetings (monthly or termly PTA/SMC meetings with published agendas and minutes) create structured opportunities for communal oversight of budgets and spending. These meetings democratize financial information parents and community members learn what funds were received and how they were used, and they can question anomalies. The literature on participatory governance in education finds that community meetings increase transparency and accountability, and can improve school performance when information is accessible and discussions are evidence-based (Ogola, 2010; Turyasingura, 2016).

Mechanically, effective meetings require timely circulation of simple financial summaries, a quorum rule, and published minutes that record decisions and sign-off. Pitfalls include elite capture (where local elites dominate proceedings), low attendance, or meetings being perfunctory. To manage those risks, head teachers can rotate meeting times, publish short easy-to-read expenditure summaries, and use community champions to boost attendance and independent verification of minutes.

The study also found that Capacity-building workshops on financial management are essential Workshops and targeted capacity-building for head teachers, bursars/treasurers and finance committee members equip them with practical skills budgeting, procurement rules, bookkeeping, petty cash controls and basic internal audit checks. Decentralization of funds without capacity- building undermines financial management: many studies (World Bank, 2018; Saito, 2008) stress that authority must be matched by skills and information systems. Training also reduces mistakes that might otherwise appear as misuse; trained personnel are likelier to comply with procedures and produce timely reports.

Effective capacity building is iterative: initial workshops should be followed by coaching, on-the- job mentoring, and refresher sessions. Peer learning, exchange visits between better-performing and weaker schools also works well and is cost-effective. Constraints include cost of training, low staff release capacity, and one-off trainings without follow-up; design solutions include modular training, blended approaches (short in-person modules + follow-up tools), and simple job-aids (checklists, templates).

The study also found that regular reporting (monthly/termly financial statements) and periodic audits (internal checks and external audit where possible) are critical control mechanisms. Timely reports help detect deviations early and support corrective action;



audits validate that records reflect reality and help build stakeholder trust. International best practice in public financial management links regular reporting and audits to improved transparency and fiscal discipline (UNDP, 2009; OECD, 2019). In practice, schools can adopt a rhythm of internal monthly reconciliations, quarterly summary reports to the district/MoE, and annual external audits or spot checks by the district finance office. Challenges include cost and logistics of external audits and capacity to prepare audit-ready documentation; a pragmatic approach is risk-based spot checks and strengthening internal audit checklists so that problems can be found and corrected before an external audit is required.

The study also found that Establishing school finance committees for oversight. A school finance committee (or school management committee with a finance subcommittee) composed of the head teacher, a teacher representative, PTA members and the school treasurer provides institutionalised oversight and decision-making. These committees approve budgets, sign off purchases and review periodic financial statements. Governance literature suggests that local oversight structures, when inclusive and independent, significantly reduce opportunities for fund misuse and increase accountability (Brinkerhoff & Brinkerhoff, 2015).

Successful committees have clear terms of reference, documented procedures (e.g., procurement thresholds), fixed tenures for members, and basic training for non-technical members to understand financial statements. Risks include capture by dominant members, lack of independence (committee dominated by the head teacher), and tokenism (committees that exist only on paper). Mitigations are transparent selection/election of community representatives, rotation of membership, and regular publication of committee decisions.

The study also found that Enhancing transparency through public display of expenditure is essential. Public disclosure of allocations and actual spending (on notice boards, community meetings, or simplified pamphlets) directly reduces information asymmetry between school managers and stakeholders. Reinikka & Svensson's (2004) landmark study in Uganda showed that public disclosure reduced resource leakage and increased parental engagement. Transparency creates reputational incentives for head teachers and finance committees to manage funds properly because deviations become visible to the community.

Practically, schools can post the amount of the grant received, items purchased, and amounts spent, in plain language and local language where necessary. Visuals (simple charts or infographics) assist stakeholders with low numeracy. Constraints include low literacy and concerns about security (posting bank details). Solutions include using simple icons/pictograms, translating summaries into local languages, and posting aggregate summaries rather than sensitive bank details.

The study also found that prioritizing needs through participatory budgeting is essential.

Participatory budgeting engages teachers, parents and students (where appropriate) in setting spending priorities a process that aligns limited funds with community-identified needs (repairs, teaching materials, sanitation). This approach improves the



legitimacy and acceptability of spending decisions and reduces conflicts over resource allocation (Bryson, 2018). Participatory budgeting also nurtures shared ownership, which can motivate monitoring by stakeholders.

To work well, participatory budgeting requires clear rules (what funds can be used for), an evidence base (estimates/costs for proposed items), and a transparent method for ranking priorities (scoring, simple voting). Constraints include domination by vocal groups and the extra time needed to facilitate broad participation. Structured facilitation, transparent criteria, and small representative budgeting committees can reduce capture and keep processes efficient.

A clear, two-way communication channel between schools and MoE/district officials ensures that head teachers can clarify guidelines, seek approvals, report disbursement delays, and request technical support. Vertical communication reduces ambiguity about allowable expenditures and procurement rules and allows district officials to provide oversight or rapid troubleshooting.

Decentralization literature emphasizes that local actors need reliable support from higher tiers of government to manage delegated funds effectively (World Bank, 2018; Saito, 2008).

Mechanisms include scheduled district feedback sessions, digital submission of summary reports, and escalation protocols for urgent issues (e.g., significant shortfalls). Bottlenecks are bureaucratic delays and inconsistent guidance; mitigation options include standardized reporting formats, pre-approved procurement lists for common items, and the use of simple digital communication (SMS or low-bandwidth apps) for routine queries.

The study also found that introducing internal monitoring and evaluation mechanisms is essential. Internal M&E (simple performance indicators, periodic internal reviews, checklists and spot-checks) allows schools to track whether funds achieve intended outputs textbooks procured, classrooms repaired, or teacher training held. A functioning internal M&E system supports adaptive management: if indicators show deviation, corrective actions are implemented promptly. The UNDP's RBM approach and public finance guidance emphasise that M&E is central to sustaining results from public spending (UNDP, 2009).

For schools, practical internal M&E can be a short set of indicators (timeliness of disbursement, % of budget spent on instruction, number of community meetings held) and quarterly self-assessment reports to the finance committee. Barriers include data quality and additional workload; solutions are to keep indicators limited and actionable, use simple templates, and integrate M&E into existing meeting agendas so it is not an extra burden.

Encouraging community involvement in resource mobilization is an important study finding that Community resource mobilisation (fundraising events, in-kind contributions such as labour/materials, or local partnerships) supplements grant funding and can enable schools to implement prioritized projects that grants alone cannot cover.



Beyond finance, resource mobilisation deepens community ownership and social accountability communities that invest time or resources become more vigilant guardians of school finances (Turyasingura, 2016; Ogola, 2010).

However, reliance on local mobilisation can exacerbate inequalities between richer and poorer communities; wealthier areas mobilize more and risk widening disparities. Careful policy design is needed so that community contributions are voluntary, properly recorded, transparently used, and not a substitute for essential government funding. Combining resource mobilisation with transparent reporting and equitable budgeting rules reduces the risk of inequity and misuse.

The strategies above are most effective when combined: technical controls (record-keeping, audits), governance structures (finance committees, stakeholder meetings), capacity building, and participatory measures (transparency, participatory budgeting) create mutually reinforcing checks and incentives. International evidence shows that single measures (e.g., giving grants alone) rarely solve leakage or misuse; bundled approaches that include disclosure, local oversight and capacity- building produce stronger results (Reinikka & Svensson, 2004; World Bank, 2018; OECD, 2019).

For policy and practice, recommend a package approach: (1) immediate low-cost actions (public display of expenditure, standard templates); (2) medium-term investments (training, simple digital tools for record-keeping); (3) systemic measures (regular audits, clear MoE guidance, institutionalised finance committees). Monitor and adapt using a small set of outcome indicators (timeliness of spending, percent of funds spent on instructional items, community satisfaction), and ensure mechanisms to protect poorer schools from over-reliance on local fundraising.

6. Other Strategies Adopted by Head Teachers

Flowchart of Strategies

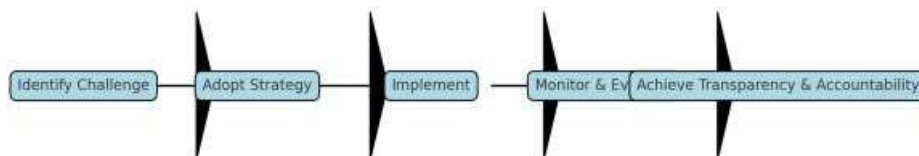


Figure 8: Flowchart of Strategies

The flowchart of strategies offers a step-by-step depiction of how head teachers manage Free Education Grants, beginning with the identification of challenges, followed by the adoption of appropriate strategies, implementation, monitoring and evaluation, and ultimately the achievement of transparency and accountability. This structured sequence highlights the fact that effective grant management is not random but rather a deliberate and planned process. By breaking down the management cycle into distinct stages, the flowchart underscores the importance of a systematic approach, where each stage builds upon the previous one to ensure sound outcomes.

The first stage, challenge identification, reflects the reality that schools often face diverse financial pressures, ranging from delays in grant disbursement to inadequate



amounts of funding. Recognizing these challenges early is critical because it enables school leaders to prioritize interventions appropriately. Research by Brinkerhoff and Brinkerhoff (2015) has shown that effective public sector management is rooted in the ability to diagnose problems accurately before designing solutions, a principle mirrored in this stage of the flowchart.

The adoption of strategies represents the second phase in the flowchart, emphasizing decision-making as a crucial skill for head teachers. Depending on the nature of the challenge, head teachers may choose strategies such as strengthening financial record-keeping, forming finance committees, or holding stakeholder meetings. The flowchart emphasizes flexibility, as no single strategy is universally applicable to all schools. This reflects the adaptive nature of educational management in low-resource contexts, where context-specific solutions are essential (Saito, 2008).

Implementation, the third stage, reinforces the point that policies and strategies only become meaningful when translated into action. For instance, introducing a finance committee is ineffective unless members are actively trained and engaged in oversight. This stage resonates with the idea of policy execution being as important as policy formulation, as observed by the World Bank (2018) in its report on education financing. The flowchart therefore captures not only the decision-making but also the operational dimension of grant management.

Monitoring and evaluation, as the fourth stage, underscores accountability in resource use. This is where school leaders ensure that adopted strategies are working effectively and resources are being utilized for intended purposes. Continuous monitoring also allows for early detection of misuse or inefficiencies, thereby minimizing risks of misappropriation. The Results-Based Management (RBM) framework strongly emphasizes the need for regular monitoring as a way to sustain results and ensure accountability (UNDP, 2009). The flowchart reflects this international best practice.

By following the flowchart cycle, schools can reach a point where expenditures are visible, stakeholders are satisfied, and confidence in the education system is enhanced. Reinikka and Svensson (2004) demonstrated in Uganda that when schools transparently displayed their grants, leakage of funds reduced significantly. The flowchart therefore illustrates a transformative journey: from identifying problems to achieving trust through systematic and accountable financial practices.

SWOT Matrix of Strategies



Figure 9: The SWOT matrix



The SWOT matrix offers a framework for analyzing the internal and external factors affecting grant management strategies. By categorizing Strengths, Weaknesses, Opportunities, and Threats, it provides a structured understanding of both the positive and negative forces shaping outcomes. This analytical lens highlights the dynamic environment in which school leaders operate, balancing internal capacities with external pressures.

Strengths identified in the matrix include strong oversight mechanisms and reporting practices. These reflect the efforts of head teachers to establish accountability structures such as finance committees and transparent reporting channels. These strengths serve as foundations for credibility and align with Bryson's (2018) assertion that strategic planning must build on existing institutional capacities. Such internal strengths increase the likelihood of effective fund utilization.

Weaknesses, however, reveal critical internal gaps, such as limited financial resources and inadequate training in financial management. These constraints undermine the ability of schools to fully utilize the grants effectively. As noted by Saito (2008), many decentralization initiatives fail because the local actors tasked with managing funds lack the required technical and administrative skills. Weaknesses in financial literacy and human capacity therefore remain significant barriers.

Opportunities in the matrix highlight external possibilities such as enhanced community participation and the supportive framework of decentralization policies. These opportunities, if seized, can transform weaknesses into strengths. For example, active community involvement can reduce monitoring burdens on head teachers, while favorable policies can provide additional resources. The OECD (2019) emphasizes that opportunities created by decentralization should be leveraged to maximize accountability and efficiency.

Threats in the SWOT analysis include risks such as misuse of funds and bureaucratic inefficiencies. These external challenges can undermine even the strongest internal practices. For example, delayed disbursements from central government can create liquidity challenges, forcing schools to suspend planned activities. Similarly, the risk of corruption at higher levels poses systemic threats to transparency. As observed by Brinkerhoff and Brinkerhoff (2015), systemic threats must be mitigated through robust governance mechanisms and strong accountability frameworks.

The value of the SWOT analysis lies in its holistic perspective. It demonstrates that while schools may have certain strengths and opportunities, weaknesses and threats cannot be ignored. The matrix encourages school leaders to maximize their strengths, build capacity to address weaknesses, take advantage of policy opportunities, and implement safeguards against risks. This balanced perspective is vital for sustainable grant management.



Strategy-Outcome Matrix

Table 3: Strategy-Outcome Matrix

Strategies/Outcomes	Accountability	Capacity	Trust	Sustainability
Record-keeping	✓		✓	
Workshops	✓			
Transparency	✓	✓	✓	✓
Community Engagement	✓	✓		✓

The strategy-outcome matrix establishes direct linkages between the strategies adopted by head teachers and the outcomes they are intended to produce. By aligning specific actions such as record-keeping, capacity-building workshops, transparency measures, and community engagement with results like accountability, capacity, trust, and sustainability, the diagram makes explicit the cause-and-effect relationship between interventions and impacts.

One key insight from the matrix is that record-keeping primarily leads to accountability. Proper documentation of expenditures ensures that funds can be traced, verified, and justified, reducing the possibility of misuse. This corresponds with international standards of financial management, which stress that accountability is anchored in meticulous record maintenance (OECD, 2019).

Workshops and training are linked with enhanced capacity, showing that knowledge and skill- building directly improve the ability of school leaders to manage funds effectively. Without adequate training, strategies like reporting or committee oversight are unlikely to be implemented correctly. This finding echoes the World Bank's (2018) insistence that decentralization must go hand-in-hand with capacity development to achieve long-term results.

Transparency measures are tied to the outcome of trust. By displaying expenditures publicly and involving multiple stakeholders in financial decisions, schools build credibility. Reinikka and Svensson (2004) found that public display of grants in Uganda significantly increased parental trust and reduced corruption. Thus, the matrix emphasizes that transparency is not only a governance requirement but also a tool for building social capital.

Community engagement is linked to sustainability. By involving parents, PTAs, and community leaders in financial decisions and even resource mobilization, schools secure long-term support that goes beyond government grants. This resonates with Turyasingura's (2016) findings in Uganda, which demonstrated that community involvement fostered ownership and sustainability in school financing.

The matrix also demonstrates that strategies are not exclusive to one outcome; there are overlaps. For example, transparency also contributes to sustainability, while community engagement can improve accountability. These overlaps indicate that a



combination of strategies often yields multiple benefits, making integrated approaches more powerful.

Ultimately, the strategy-outcome matrix reflects the OECD (2019) principle of linking financial strategies to measurable governance outcomes. It illustrates that grant management is most effective when strategies are clearly aligned with outcomes, enabling both accountability and developmental results. This cause-and-effect perspective is critical for demonstrating the value of grants to both government and communities.

Mind Map of Strategies

The mind map clusters strategies into three broad categories: Transparency, Capacity Building, and Community Engagement, demonstrating the multidimensionality of financial management. This categorization helps visualize the interrelationships between various approaches adopted by head teachers. Transparency strategies focus on the visibility of resource use, capacity-building strategies focus on equipping personnel with skills, and community engagement strategies emphasize inclusiveness and participation. The use of a mind map demonstrates that grant management is not a singular, linear process but a combination of parallel interventions that must be integrated for success.

Under the transparency category, strategies such as public display of expenditures, timely reports, and the establishment of finance committees are highlighted. These practices serve to reduce information asymmetry between school management and the community, ensuring that parents, teachers, and the public know how resources are being used. This resonates with Reinikka and Svensson's (2004) findings in Uganda, where public disclosure of funding allocations reduced corruption and improved accountability. Transparency, therefore, acts as the foundation of trust-building in schools.

Capacity building is a second thematic cluster in the mind map, comprising training workshops and Ministry of Education support. These strategies acknowledge that financial management requires technical skills, which head teachers and school committees may not naturally possess. Workshops and training programs address these gaps by providing school leaders with the knowledge necessary to implement transparent accounting practices. The World Bank (2018) emphasizes that decentralization in education financing can only be effective when accompanied by capacity development, a principle clearly reinforced by this theme of the mind map.

Community engagement emerges as the third critical category. Strategies such as Parent-Teacher Association (PTA) meetings and mobilization of local resources ensure that parents and local leaders are not only passive observers but active participants in decision-making. By engaging the community, head teachers can both secure additional resources and enhance accountability, as stakeholders become watchdogs over school funds. Studies in Kenya and Uganda confirm that community involvement in financing improves accountability and school performance (Ogola, 2010; Turyasingura, 2016).



The interrelationship among the three categories is a key insight of the mind map. For instance, transparency practices such as financial reporting build trust, which then makes community engagement easier and more productive. Similarly, community involvement may reveal knowledge gaps that necessitate capacity-building interventions. This interconnectedness underscores the idea that no single strategy can stand alone rather, a holistic approach is needed for sustainable financial management. In the broader discussion, the mind map illustrates the importance of multi-stakeholder governance. It reflects global best practices in education financing, where transparency, skill development, and participation are consistently highlighted as cornerstones of successful financial management (OECD, 2019). Thus, the mind map not only organizes strategies visually but also conveys the need for synergy among different interventions.

7. Perceived Impact of Free Education Grants on School Operations, Infrastructure, and Quality of Education

Table 4: Perceived Impact of Free Education Grants

Theme	Perceived Impact	Verbatim Responses (Heads & Teachers)
School Operations	Grants have enabled the smooth running of daily school operations such as the procurement of teaching and learning materials, payment of utilities, and funding of minor school activities.	Head Teacher 1: "Without these grants, it would be impossible to run the school effectively because parents are no longer paying user fees. The grants have filled that gap." Teacher 3: "We now have enough chalk, markers, and manila papers for our lessons, which makes teaching easier and more interactive."
Infrastructure Development	The grants have supported the rehabilitation and maintenance of classrooms, though they are inadequate for major construction.	Head Teacher 2: "We managed to renovate two classrooms and repair broken desks using the grants, though the money is not enough for new buildings." Teacher 5: "The school environment is improving little by little because small repairs are now possible, something that was difficult before."
Teaching and Learning Resources	There has been an improvement in the availability of instructional materials, which enhances teaching effectiveness and learner participation.	Head Teacher 4: "We can now buy textbooks and distribute them to learners, reducing the problem of pupils sharing one book among five." Teacher 7: "We feel more motivated because the resources are there. Learners now have exercise books provided, which helps with assignments."
Access & Equity	Grants have reduced the financial burden on parents, increasing	Head Teacher 6: "Since the introduction of free education and the grants, enrolment has
Theme	Perceived Impact	Verbatim Responses (Heads & Teachers)
	enrollment and attendance.	increased because children from poor families can now attend school." Teacher 8: "We have noticed that absenteeism has reduced because learners are no longer sent home for failing to pay school fees."



Quality of Education	Teachers perceive a gradual improvement in learning outcomes due to better resources, though challenges remain.	Head Teacher 9: "Teaching has become more effective because we have materials, but quality also depends on classroom space and teacher numbers." Teacher 10: "Learners are more engaged, and the pass rate has shown slight improvements, but overcrowding remains a challenge."
Challenges / Limitations	The grants are insufficient to cover all needs, leading to the prioritization of urgent over long-term projects.	Head Teacher 5: "The money is helpful, but it is too little to cover everything. We sometimes have to choose between buying textbooks or repairing toilets." Teacher 2: "It helps, but overcrowding and lack of adequate infrastructure still affect the overall learning experience."

The study sought to assess the perceived impact of Free Education Grants (FEGs) on school operations, infrastructure development, and the overall quality of education in public secondary schools. Analysis of the 70 combined responses from head teachers and teachers revealed several recurring themes, reflecting both positive outcomes and persistent challenges in grant utilization.

A majority of respondents emphasized that FEGs have been instrumental in ensuring the smooth functioning of daily school operations. Head teachers and teachers consistently noted that grants cover essential operational costs, including procurement of teaching and learning materials, payment of utilities, and support for minor school activities. For instance, multiple respondents indicated that the availability of chalk, markers, exercise books, and teaching aids has significantly improved classroom delivery. As one teacher noted, learners now have adequate resources, reducing the need for sharing materials, which in turn fosters engagement and active participation. Similarly, several head teachers highlighted that grants reduce dependency on parental contributions, allowing the school to maintain stability even when parents are unable to pay fees.

These findings are consistent with Chansa (2018) and World Bank (2019), who argued that decentralized school grants enhance operational efficiency and ensure continuity of teaching and learning activities. FEGs in Zambia have thus contributed to operational sustainability, particularly in schools serving disadvantaged communities.

While respondents acknowledged improvements in infrastructure, the consensus was that grants are largely sufficient only for minor repairs and renovations, rather than major construction projects. Many head teachers reported using grant funds to repair broken desks, renovate classrooms, or maintain school sanitation facilities. A teacher noted, "The environment is improving little by little because small repairs are now possible, something that was difficult before."

This aligns with previous research by Musonda and Mulenga (2020), which found that grants in Zambia typically support routine maintenance but rarely fund large-scale infrastructural development. Despite these limitations, the small-scale improvements



were seen as critical to creating a more conducive learning environment, especially in overcrowded schools with aging infrastructure.

The study revealed that the provision of learning materials is one of the most noticeable impacts of FEGs. Head teachers and teachers highlighted that grants enable them to purchase textbooks, exercise books, and instructional aids, reducing material shortages that previously hindered effective teaching. One head teacher noted that distributing textbooks to learners ensures equitable access and reduces the pressure on teachers to improvise during lessons.

Teachers also observed that the availability of resources positively impacts learner participation and motivation. This observation aligns with UNESCO (2020), which asserts that access to quality instructional materials is strongly associated with enhanced student learning outcomes. The study indicates that FEGs contribute significantly to the pedagogical environment, fostering both teacher efficiency and learner engagement.

Respondents consistently highlighted that FEGs improve access to education and promote equity. The elimination of fees through grants enables children from low-income families to attend school without financial barriers. Several head teachers noted increased enrolment since the introduction of free education grants, and teachers reported reduced absenteeism and dropouts.

These findings support earlier studies by Chanda (2017) and UNESCO (2020), which demonstrate that school grants and fee elimination initiatives increase school participation rates, particularly among disadvantaged learners. By reducing economic barriers, FEGs contribute to more inclusive education systems, ensuring that no child is left behind due to financial constraints.

Respondents generally perceived gradual improvements in educational quality following the introduction of FEGs. The presence of teaching and learning materials, better classroom resources, and improved operations were reported to enhance instructional delivery. However, respondents also emphasized that quality remains constrained by structural challenges such as overcrowded classrooms, insufficient teacher numbers, and inadequate infrastructure.

Teachers highlighted that learner engagement has improved, and some observed modest improvements in examination pass rates. Head teachers, however, noted that while resources are available, teaching effectiveness and learning outcomes are also dependent on broader systemic factors. This is consistent with Musonda (2019) and World Bank (2019), who argue that financial support alone cannot fully guarantee quality education; complementary investments in staffing, teacher training, and infrastructure are necessary.

Despite their positive contributions, respondents noted several limitations of FEGs. The most recurrent theme was the inadequacy of grant amounts, which forces schools to prioritize urgent needs over strategic planning. Many schools face the difficult choice



between purchasing teaching materials and repairing critical infrastructure, often leaving long-term development projects unfunded.

Another significant challenge highlighted by teachers was overcrowding and insufficient classrooms, which limit the impact of grants on learning quality. This indicates that while FEGs address immediate operational and instructional needs, systemic issues persist, constraining the overall effectiveness of the grants in transforming the educational environment comprehensively.

The findings from the 70 responses indicate that FEGs have significantly enhanced school operations, facilitated small-scale infrastructure maintenance, improved access to learning materials, and promoted educational equity. Learners benefit from reduced absenteeism and better resource availability, while teachers experience improved teaching conditions.

However, the study also demonstrates that challenges remain, particularly the insufficiency of funds for major infrastructural projects, persistent overcrowding, and limitations in staffing. This underscores the need for complementary strategies, such as increased funding, targeted infrastructure investment, and capacity-building initiatives, to ensure that grants fully realize their potential in improving the quality of education. Free Education Grants have played a transformative yet partial role in supporting Zambian secondary schools. While operational and pedagogical improvements are evident, sustained quality enhancement requires addressing systemic limitations alongside financial support.

V. Summary, Conclusion and Recommendations

1. Summary

This study explored the School head teachers' experience in managing free education grants in public secondary schools in Senga Hill District, focusing on how these grants influence school operations, infrastructure development, and the overall quality of education. Using a mixed-methods approach, the research combined quantitative analysis with qualitative insights to provide a comprehensive understanding of grant utilization. A total of seventy respondents, including both head teachers and teachers, provided information on the practical benefits and challenges associated with FEGs, allowing the study to capture a holistic view of their impact at the school level.

The findings revealed that FEGs have significantly improved the operational capacity of schools. Head teachers reported that grants have enabled the procurement of essential teaching and learning materials, payment of utilities, and smooth execution of daily administrative tasks. One head teacher noted, "Without these grants, it would be impossible to run the school effectively because parents are no longer paying user fees. The grants have filled that gap." Teachers also highlighted the positive effects on teaching; for example, one remarked, "We now have enough chalk, markers, and manila papers for our lessons, which makes teaching easier and more interactive." These experiences illustrate that grants have reduced dependence on parental contributions and facilitated a more stable operational environment, allowing schools to focus on educational delivery.



In terms of infrastructure, respondents indicated that grants have supported minor renovations and maintenance projects, such as repairing desks, renovating classrooms, and maintaining sanitation facilities. A head teacher stated, “We managed to renovate two classrooms and repair broken desks using the grants, though the money is not enough for new buildings.” Teachers echoed this view, with one observing, “The school environment is improving little by little because small repairs are now possible, something that was difficult before.” While these improvements have made learning spaces more functional, both teachers and head teachers emphasized that major infrastructural challenges, such as overcrowded classrooms, remain unresolved due to the limited size of the grants.

The provision of teaching and learning resources emerged as another important benefit of FEGs. Head teachers reported being able to purchase textbooks, exercise books, and instructional aids, ensuring that learners have access to materials necessary for effective learning. One head teacher shared, “We can now buy textbooks and distribute them to learners, reducing the problem of pupils sharing one book among five.” Teachers also highlighted the motivational impact of resource availability, with one noting, “Learners are more engaged, and they complete assignments more consistently because they have the necessary books and writing materials.” These observations suggest that grants have directly contributed to improving pedagogical delivery and classroom engagement.

Access and equity were also positively affected by FEGs. Respondents indicated that the elimination of fees and provision of resources increased enrolment and reduced absenteeism. One head teacher mentioned, “Since the introduction of free education and the grants, enrolment has increased because children from poor families can now attend school.” A teacher added, “We have noticed that absenteeism has reduced because learners are no longer sent home for failing to pay school fees.” These expressions underscore that FEGs have enhanced educational inclusivity, enabling children from disadvantaged backgrounds to participate more fully in learning opportunities.

Despite these positive impacts, the study identified several challenges in grant management. The most frequently cited concern was the insufficiency of grant amounts to meet all school needs. Head teachers reported having to prioritize immediate operational needs over long-term projects, with one explaining, “The money is helpful, but it is too little to cover everything. We sometimes have to choose between buying textbooks or repairing toilets.” Teachers similarly noted that limitations in classroom space and staff numbers continued to affect teaching quality, stating, “It helps, but overcrowding and lack of adequate infrastructure still affect the overall learning experience.” Administrative bottlenecks and reporting requirements were also highlighted as factors slowing the effective utilization of funds.

The experiences shared by head teachers and teachers demonstrate that FEGs have a transformative yet partial impact on public secondary schools in Senga Hill District. The grants support operational stability, provide essential learning resources, and promote equity, but systemic constraints, such as limited funding, inadequate infrastructure, and staffing shortages, continue to hinder improvements in educational quality. Respondents emphasized that effective management requires not only



sufficient financial resources but also enhanced administrative capacity, strategic planning, and community engagement to ensure transparency and sustainability.

Free Education Grants play a critical role in supporting schools, improving operational efficiency, and enabling learners to access educational opportunities. Teachers and head teachers consistently noted the practical benefits of having reliable funding and resources, which have made daily teaching and learning more manageable and equitable. However, the study also highlights persistent challenges, emphasizing the need for additional support, infrastructure investment, and strategic management to fully realize the potential of FEGs in enhancing educational quality and sustainability in Senga Hill District.

2. Conclusion

The study concludes that Free Education Grants (FEGs) play a critical and transformative role in supporting public secondary schools in Senga Hill District. The grants have significantly enhanced school operations by enabling the procurement of teaching and learning materials, payment of utilities, and execution of daily administrative functions, as highlighted by both head teachers and teachers. They have also contributed to improving access to education, particularly for learners from disadvantaged backgrounds, by reducing financial barriers and promoting equity.

The provision of instructional resources through FEGs has positively impacted teaching effectiveness and learner engagement. Teachers reported that learners are more participative and motivated when adequate materials, such as textbooks and exercise books, are available. Head teachers noted that the grants allow for better planning and prioritization of school needs, contributing to operational stability and improved service delivery.

Despite these positive impacts, the study also concludes that the effectiveness of FEGs is constrained by systemic challenges. The grant amounts are often insufficient to address major infrastructural needs, such as classroom construction or expansion, and schools frequently face overcrowding and limited staffing. Administrative and reporting requirements further complicate efficient utilization, occasionally delaying procurement and limiting flexibility.

The experiences shared by respondents indicate that FEGs have a partial but significant effect on improving educational quality. While they provide essential support for daily operations and minor infrastructural improvements, they alone cannot fully resolve underlying challenges that affect learning outcomes. Sustainable improvements require a combination of adequate funding, enhanced administrative capacity, strategic planning, and community involvement.

Free Education Grants are an essential mechanism for supporting public secondary schools in Senga Hill District, ensuring operational continuity, access to educational resources, and increased learner participation. However, to maximize their impact, there is a need for complementary measures, including increased allocations, targeted infrastructural investment, capacity building for school administrators, and enhanced accountability mechanisms. By addressing both financial and systemic constraints,



policymakers and educational administrators can ensure that FEGs contribute not only to operational efficiency but also to the sustainable improvement of educational quality and equity.

3. Recommendation

The recommendations based on the study findings:

- The government should ensure that FEG allocations are sufficient to cover both operational and minor infrastructural needs. Regular and predictable disbursement schedules will allow schools to plan effectively, reduce financial uncertainty, and improve resource allocation.
- The government should develop a complementary funding mechanism specifically for infrastructure, including classroom construction, sanitation facilities, and staff housing. This will help address persistent challenges such as overcrowding and inadequate learning spaces.
- The government should provide training for head teachers and school administrative staff on financial management, reporting, and accountability. Enhanced capacity will reduce administrative bottlenecks and ensure that grants are used efficiently and transparently.
- The government should establish robust monitoring and evaluation frameworks to track the utilization and impact of FEGs. Regular audits and site visits can ensure transparency, identify gaps in resource allocation, and provide data for evidence-based policy adjustments.
- The government should encourage active involvement of School Boards, Parent-Teacher Associations (PTAs), and community representatives in planning and overseeing grant utilization. This enhances accountability, fosters local ownership, and ensures that resources are aligned with school-specific needs.
- The government should allocate a dedicated portion of FEGs for teaching and learning resources such as textbooks, laboratory equipment, and digital tools. This will directly improve teaching quality and learner engagement, especially in under-resourced schools.
- The government should encourage schools to develop medium- and long-term strategic plans for grant utilization, including contingency measures for emergencies. Schools should be supported in aligning FEGs with broader educational development goals to ensure sustainable impact over time.

Future Research

Further research should focus on:

- **Long-term impact of Free Education Grants on learning outcomes** – Examining how FEGs influence student academic performance over multiple years, including pass rates, retention, and transition to higher education.
- **Effectiveness of grant utilization strategies at the school level** – Investigating which school-level management practices and leadership approaches optimize the use of grants.
- **Infrastructure development and resource adequacy** – Assessing the gap between grant allocations and infrastructural needs, including classrooms, sanitation, and learning resources.



- **Teacher capacity and professional development** – Exploring how teacher training, motivation, and resource availability interact with FEGs to affect teaching quality.
- **Equity and access among vulnerable groups** – Examining how FEGs impact access to education for children from marginalized or low-income communities.
- **Community and stakeholder involvement** – Investigating the role of parents, School Boards, and local communities in the effective utilization and sustainability of grants.
- **Comparative studies across regions** – Conducting cross-district or provincial studies to identify contextual factors that influence the effectiveness of FEGs in different settings.

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