Independent Impact Study of the School Improvement Grant (SIG) in Zimbabwe

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Final Report

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Abbreviations

AIDS	Acquired Immune Deficiency Syndrome
CERID	Centre of Education, Research, Innovation and Development
CTT	Core Technical Team
DFID	Department for International Development, UK
DSI	District Supervisor Inspectorate
ECD	Early Childhood Development
ECG	Education Coordination Group
ECOZI	Education Coalition of Zimbabwe
EDF	Education Development Fund
EMIS	Education Management Information System
FGD	Focus Group Discussion
FCDO	Foreign Commonwealth and Development Office
GDP	Gross Domestic Product
GNI	Gross National Income
GPE	Global Partnership for Education
HIV	Human Immunodeficiency Virus
ISQ	Impact Study Question
KfW	German Development Bank
MoPSE	Ministry of Primary and Secondary Education, Zimbabwe
QS	Quality Assurance
OVCs	Orphans and Vulnerable Children
P3	Primary schools with lowest income
PFM	Public Financial Management
RTGS	Real-Time Gross Settlement
S3	Secondary schools with lowest income
SDC	School Development Committee
SDP	School Development Plan
SIG	School Improvement Grant
ToC	Theory of Change
ToR	Terms of Reference
TREG	The Research and Evaluation Group
QS	Quality Support
UK	United Kingdom of Great Britain and Northern Ireland

UN	United Nations
UNICEF	United Nations Children's Fund
US	United States of America
USD	United States dollar
VFM	Value For Money
ZANU-PF	Zimbabwe African National Union – Patriotic Front
ZIMVAC	Zimbabwe Vulnerability Assessment Committee

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Main Messages

There is clear persuasive evidence that the School Improvement Grant (SIG) reaches the most fragile schools in Zimbabwe and has contributed to, and enhanced, the learning environment for pupils at these schools. The grant has improved the physical conditions of schools and has been effective in helping ensure school functionality. The responsiveness and adaptability of the SIG program has led to criteria that ensure the SIG is funding the right things, and its strong developmental thrust ensure its benefits will endure.

In 2020, grants were received by over 4500 schools across Zimbabwe, representing more than half the schools in the country. The grant is principally targeted towards the schools with the lowest incomes: over 90% of schools with an average annual income of less than 15,000 USD received the SIG in 2020. It also provides grants to a small number of Special Schools. However, due to funding constraints, the size of the grant has decreased since 2014/2015, and the number of schools covered has also decreased.

Our analysis found distinct positive differences between those schools who receive the grant and similar schools without SIG payments. In our survey sample:

- The Grade 7 pass-rate of schools sampled that received the SIG had increased by 23% in 2019 compared with 2015, while the pass-rate of schools without the grant increased by 13% over the same time period.
- SIG schools on average experienced increased enrolment of 3% whereas the schools without SIG had decreased enrolment of -1.1% over the same period.
- Schools receiving the SIG were better equipped in terms of basic learning material and classroom furniture than equivalent schools which do not receive the grant.
- Analysis of EMIS data for our sample also revealed a positive effect for girls in terms of enrolment; the work funded by SIG payments on additional WASH facilities was repeatedly noted by key informants as having a positive impact on girls' enrolment and attendance.
- There was no evidence that the provision of the SIG has led to parents decreasing their giving.

There are a number of concerns around the data and its compatibility with Government systems. Inclusion of EMIS numbers in databases on SIG disbursement would allow better data management, increased ease of auditing, and alignment with Government systems, improving data quality.

Key areas to enhance impact of SIG:

- The grant amount should be raised as it is not sufficient to meet the basic needs of schools (learning materials, school furniture, sanitation facilities, and office costs), which triggers the question of whether the level of low funding should continue to all schools or if the criteria should be changed so that fewer schools receive more resources. That trade-off is one that the MOPSE and partners will need to grapple with going forward.
- Improve predictability of grant, and consistently provide it at the beginning of the school year, in January, as was done in 2020. This ensures pupils have the materials from the outset of the academic year and enhances their learning.
- Currency fluctuations undermine the value of the grant and diminish what a school can actually spend. Disseminate good practice on use of accounts which minimise transaction costs, particularly cost of exchange.
- Infrastructure, which is no longer covered by the SIG, remains an important need for many schools, particularly Satellite schools. Consider if lessons can be learned from distribution of Emergency/ Complementary grants for infrastructure to guide the process more widely and/or support MoPSE's efforts to advocate for more to be allocated from the fiscus into school infrastructure, to allow SIG payments to be used for other materials/supplies that allow the school to function effectively.
- Support for OVC fees needs to be reconsidered if appropriate safeguards can be put in place.

Executive Summary

Purpose

ES1. The objective of this impact study is to assess the impact of the School Improvement Grant (SIG) in order to assist the Ministry of Primary and Secondary Education (MoPSE) to determine how best the SIG can be improved as a mechanism for school financing, and to determine how effective the grant is in improving access to education for the poorest, ensuring that the schools most in need are being targeted, and whether minimum school functionality, as defined through the SIG utilisation criteria, was reached. The primary audience for this impact study is MoPSE, UNICEF and the two main funders, namely the Foreign, Commonwealth & Development Office (FCDO) previously known as the Department for International Development (DFID) and the German Development Bank (KfW).

Approach

ES2. The study was undertaken in line with the agreed terms of reference (ToR) and our inception report, which was drafted following extensive discussion with UNICEF, MoPSE, and key development partners. The key elements of the approach included key informant interviews, focus group discussions, a survey of 900 randomly selected head teachers (700 receiving SIGs for deeper exploration of its impact, and 200 without SIG payments for comparative analysis), and analysis of EMIS data.

ES3. The EMIS data, combined with SIG data as provided by UNICEF, gave the research team insight into the profile of schools in Zimbabwe as a whole, and specifically the schools that were targeted by the SIG. Analysis was done, inter alia, on Grant Class, income levels, school size, enrolment numbers, G7 candidates and passes, all in regard to the number of times a school received SIGs. A gender perspective was also applied.

ES4. Headline findings from the impact study were presented to the Education Reference Group. The presentations allowed key stakeholders to validate and verify initial findings and also comment on an initial set of recommendations. This draft report will be shared with the key stakeholders for comment and feedback before being finalised.

Context

ES5. Zimbabwe is a land-locked country with a population of 15.6m, 34 percent of whom live in extreme poverty. Political and economic conditions over the past three decades have made Zimbabwe a food-insecure country that is vulnerable to environmental shocks. Recent currency turmoil, hyperinflation, severe droughts and the current COVID-19 pandemic has exacerbated existing vulnerabilities.

ES6. Zimbabwe has a young population, with 41 percent under the age of 14, but many remain outside the formal school system. Since 2016 there has been a decline in the proportion of school-age children in school, although Zimbabwe is making some progress in strengthening the right to education through policy and legislation. The Education Amendment Act (Act 15-2019) specifically entrenches the Right to Compulsory Basic State-Funded Education and a policy option paper on School Financing to support free basic education has been produced in order to help inform the development of a school financing policy.

ES7. As a share of GDP, the education allocation of the total government budget has fallen from the peak of 5.4% of GDP in 2014 to the revised 3% in 2019 (the average for the African continent is about 5 per cent of national GDP). However, compared to 2019, employment costs as a share of the total education budget have been reduced from 86% in 2019 to 44% in 2020 and capital expenditure allocation has increased from 5% in 2019 to 20% in 2020. Nevertheless, the education sector has not escaped the major shocks that have recently beset Zimbabwe: teacher salaries have sharply depreciated, many parents are no longer able to pay school fees, and grain rationing has disrupted school feeding schemes.

SIG

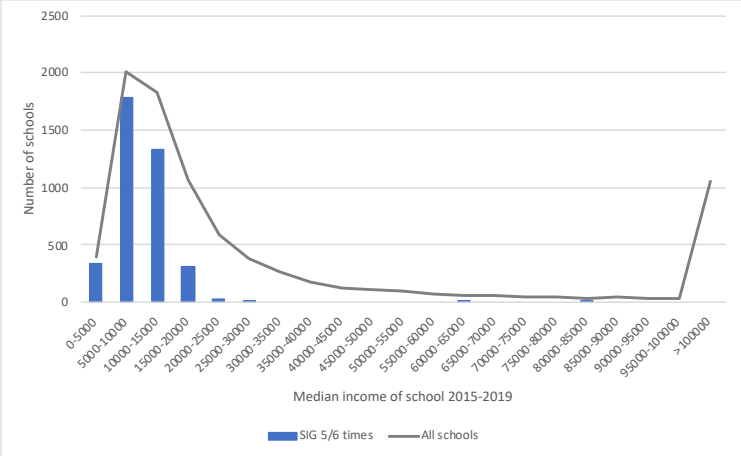
ES8. The SIG is implemented by MoPSE with support from UNICEF and has been in place since 2013. There is a clear segregation of functions in the implementation of the SIG in schools. MoPSE is the custodian of the programme and it regulates activities and acts as the final arbiter. UNICEF is the fund holder and technical partner and is responsible for the payment of the grant directly to the beneficiary schools' bank account. SIG funding is currently provided by FCDO and KfW, whereas previously a number of other donors were also involved. With fewer donors in the sector the budget for the SIG program has decreased over time.

ES9. SIG selection criteria have a strong equity focus, and although they have been adjusted over the years typically have taken into account school income, grant class, and distance from the district office. How the grant is spent by schools is based on the utilisation criteria, which stipulate eligible and non-eligible items. The utilisation criteria basically establish the components of 'school functionality' each year. There is a robust and clear mechanism that MOPSE has in place, which UNICEF supports, to ensure all funds reach schools and the steps to be taken if any misappropriation of funds occurs. Verification findings and monitoring reports are used to inform the utilisation criteria, and uncover, if any, ineligible expenditure or unaccounted funds.

Main Findings

ES10. **SIG Targeting**: The SIG has been successful in targeting the most fragile schools, where parents are less able to pay fees and levies. Since the outset, SIG criteria have evolved over time, becoming more equitable. Although there are a limited number of schools of low income which are not receiving SIG payments, mainly because they do not fall within the criteria. The figure below shows this graphically; Special Schools are outliers in this respect as they have larger incomes but greater needs.

Figure 1 SIG recipient schools vs all schools by median income



ES11. **School Functionality**: The SIG has been effective in helping ensure school functionality and its largely developmental thrust mean that its benefits are likely to be felt for some time. SIG is seen to be covering the right things and has been able to fund key projects in the broader realm of improvements in the teaching and learning environments. Our survey of head teachers found that schools benefiting from SIG payments were more likely to have basic learning materials and school furniture compared with the sample without SIGs, and that the grant has had a noticeable effect on improving water and sanitation facilities at the targeted schools.

ES12. Our analysis found distinct positive differences between those schools who receive SIG payments and similar schools without, with respect to both pass-rates and enrolment.

ES13. **Pass Rates**: In our comparative samples, the Grade 7 pass-rate of schools receiving SIG payments had increased by 23% in 2019 compared with 2015, while the pass-rate of schools without SIG had only increased by 13% over the same period. In terms of gender, girls increased their pass rate by 23% in SIG schools sampled (versus 16% for girls in non SIG schools) over the same period, and boys increased their pass rate by 21% (versus 9.2% for boys in non SIG schools).

ES14. **Enrolment:** In our sample, enrolment had increased at both primary and secondary schools with SIG payments, while in a comparative sample of schools without SIGs the level of enrolment had decreased, though some caution is needed in considering this finding as satellite schools and smaller school, both of which are more likely to receive SIG, are also more likely to grow. Our study found evidence that the gender gap is narrowing at P3 and S3 schools. While, on a national level, gender parity appears to have been achieved in school enrolment[1], on disaggregation of the data, there remains disparity for lower income schools (P3 and S3). In our sample, the enrolments for girls in schools receiving SIG payments had increased more than the enrolments for boys, thus reducing gender disparity at this level of the schooling system. Survey findings also suggest that schools receiving SIGs were more likely to report that the most vulnerable were able to access learning in their school than those schools not receiving SIGs, while Focus Group Discussions frequently

[1] This is based on analysis of the EMIS data and is corroborated by other sources such as UNESCO.

raised the positive impact on enrolment as being due to SIGs, and that better facilities for girls had increased their enrolment and attendance.

ES15. **Level of funding:** Over the lifetime of the SIG, the amount awarded per school has decreased for all types of schools, though 2020 saw a moderate uplift in the amount awarded. FGDs and the survey expressed a strong desire to return to increased levels of funding. Our analysis of EMIS data supports this view, the bottom 10% of schools have seen no change in their income since 2015 yet the percentage of income contributed by SIGs to these schools has diminished. Furthermore, our research indicates that a large proportion, possibly the majority of schools receiving SIGs, do not have the means to provide basic materials; for example, 65% of SIG recipient schools sampled stated that they did not have sufficient resources to buy basic learning materials such as chalk, pens, textbooks and exercise books, the same percentage did not have enough resources to buy sufficient classroom furniture, and 63% could not afford sufficient sanitation facilities for both sexes. However, this is not to say that the number of schools targeted should be reduced, if anything, the ideal would be to increase the number of schools: our comparative sample of schools which did not receive the SIG were even worse off in in terms of not having sufficient basic learning material (85%) and sufficient desks and chairs for teachers and pupil (94%), though they were slightly better off in terms of sanitation facilities, still 59% said they had insufficient resources for this.

ES16. However, the study team appreciates that this is a hard balance to strike, that there are no easy answers here, and that our research triggers the question of whether the level of low funding should continue to all schools or if the criteria should be changed so that fewer schools receive more resources. That trade-off is one that the MOPSE and partners will need to grapple with going forward.

ES17. There was no evidence that the provision of the SIG has led to parents decreasing their giving. While parental contribution has decreased over the five-year period, this is the case for schools with and without SIG payments; furthermore, parental contribution has decreased less for schools with SIGs than a comparable sample of schools without SIGs. It is highly likely this situation will worsen as there is now a general trend of parental contribution decreasing across Zimbabwe as a result of the current economic, health, and environmental crisis.

Conclusions

ES18. Since the SIG was introduced in 2013 it has had remarkable success in terms of national coverage, targeting the most fragile schools, and has contributed to enhancing the learning environment for pupils at these schools. The SIG has been effective in helping ensure school functionality, boosting enrolment, and contributing to improving pass rates at Grade 7 level. The responsive nature and adaptability of the SIG over time is a key feature of how adjustments have helped to achieve the objectives of the SIG.

ES19. It does however remain a concern that SIG payments no longer specifically address its earlier commitment to protect the most vulnerable within schools, nor can the grant be used for improving school infrastructure. The increasing fiscal crisis in Zimbabwe, currency fluctuations, and the uncertainties about ongoing support from development partners will put the SIG under increasing strain. Nevertheless, our impact study recognises the

enormous value of the SIG program continuing. We did not find any major issues with implementation, but we have identified several key areas which we believe needs to be addressed going forward.

What are the key lessons learned?

- Lump sum allocation, disbursed in January, ensures schools can use grant effectively in a timely manner.
- By targeting those aspects that are closely link with school functionality (as defined within the SIG eligibility criteria), the SIG is contributing to enable learning to take place.
- Improving the school environment is helping to make schools more attractive, which in turn is contributing to more children accessing targeted schools.
- Irregular attendance and eventual dropping out of orphans and vulnerable children is increasing as fees for OVC is no longer an eligible criteria under the SIG.
- Eligibility criteria for utilisation have proved useful in guiding schools to address functionality issues, and have been shown to be responsive when needed (e.g. helping schools purchase PPE to ensure they remained operational in accordance with Covid-19 regulations).
- It is essential to have the correct EMIS number associated with the schools right from the start to ease auditing and align with government systems, as well as to enable real-time analysis of EMIS data on SIG schools, on issues such as school income, enrolment, pass rates, to guide SIG selection.

Main Recommendations

- The grant amount should be raised as it is not sufficient to meet the basic needs of schools (learning materials, school furniture, sanitation facilities, and office costs), which triggers the question of whether the level of low funding should continue to all schools or if the criteria should be changed so that fewer schools receive more resources. That trade-off is one that the MOPSE and partners will need to grapple with going forward.
- Identify good practice with regards to resolving currency conversion issues and share with all SIG payment recipients
- Improve communications with schools so they are aware if they will receive the SIG and can plan accordingly
- Provide SIGs on time at the beginning of school year in January so schools can procure teaching and learning materials timeously.
- To address the ongoing need for improving school infrastructure consideration should be given to drawing on lessons learned from distribution of Emergency/Complementary grants re infrastructure to guide the process more widely and/ or support MoPSE's efforts to advocate for more to be allocated from the fiscus into school infrastructure, to allow SIG payments to be used for other materials/supplies that allow the school to function effectively.

- Involving the SDC more systematically in an oversight role at the school level needs to be reinforced to schools receiving the grant. DIs should be tasked with consulting with SDCs regularly to monitor SDC involvement as per the SIG guidelines.
- Need to improve data systems to make audit more efficient and to better align with Government systems, in particular using EMIS number to identify schools receiving the SIG from payment records.

1. Introduction

Impact Study Rationale

1. This Report is for the impact study of the School Improvement Grants (SIGs) in Zimbabwe. According to the terms of reference (ToR – see Annex 1),

> [t]he School Improvement Grant (SIG) programme aims 'to provide financially constrained schools with enough resources to address their most basic needs and to meet a minimum set of school functionality criteria with the aim of improving the quality of teaching and learning at the school level and reducing user fee costs for vulnerable children'. The School Improvement Grants (SIGs) are implemented by the Ministry of Primary and Secondary Education (MoPSE) with support from UNICEF and have been in place since 2013. The School Improvement Grants (SIG) are a component of the Education Transition Fund (up to 2015) and then the Education Development fund (2016-2020). All funds from SIGs are contribution of the Education Development Fund (EDF) partners: Foreign, Commonwealth & Development Office (FCDO) previously known as the Department for International Development (DFID) and the German Development Bank (KfW).

2. Given the importance of the SIG programme and the sizable investment in it, and with the second phase of the Education Development Fund (EDF II) ending in December 2021, it is timely to conduct an impact study to determine the effectiveness of the SIG, explore any impact the SIG may have had on school functionality, access to education, and the extent the school environment has improved. The study is to answer some key questions in order to determine the level and degree of the impact of SIG payments.

Objectives and Intended Users

3. The objective of the impact study is to assess the impact of the SIG in order to assist the Ministry of Primary and Secondary Education (MoPSE) to determine how best it can be improved and sustained as a mechanism for school financing, and to determine

- how effective the SIG is in improving access to education for the poorest, and
- whether minimum school functionality, as defined through SIG utilisation criteria, was reached.

4. The study covers the impact of the SIG since its launch in 2013 and, in accordance with the ToRs, used a mixed-methods study, which is national in scope.

5. The primary audience for the impact study report is MoPSE, UNICEF and key development partners (FCDO and KfW) in order to inform future SIGs' programming. Both MoPSE and UNICEF were engaged throughout the impact study process, including in its design, as key informants, to provide initial feedback, validate the findings and to co-create the recommendations through several remote presentations.

6. Other important audience groups include the Education Coalition of Zimbabwe (ECOZI), the Global Partnership for Education (GPE), key development partners, head teachers, School Development Committees and so on (for a full list of key stakeholders and their role in the study see Annex 6 for the Stakeholder analysis that was conducted during

the inception period; and for a full list of positions held by key informants during the Inception Period and the fieldwork phase see Annex 5). These groups were also directly involved throughout the impact study process, including being consulted during the inception process in order to sharpen the focus of the study, as key informants, and were also directly involved in various remote forums in which findings were presented, discussed and validated. The draft report will be shared with key stakeholders, and comments received will be incorporated into the final version of the report.

Methodology

7. Our approach to the impact study is fully described in Annex 3, the questions addressed in the study are listed in Annex 4, and key informants can be found in Annex 5. The key elements of our mixed-methods approach include:

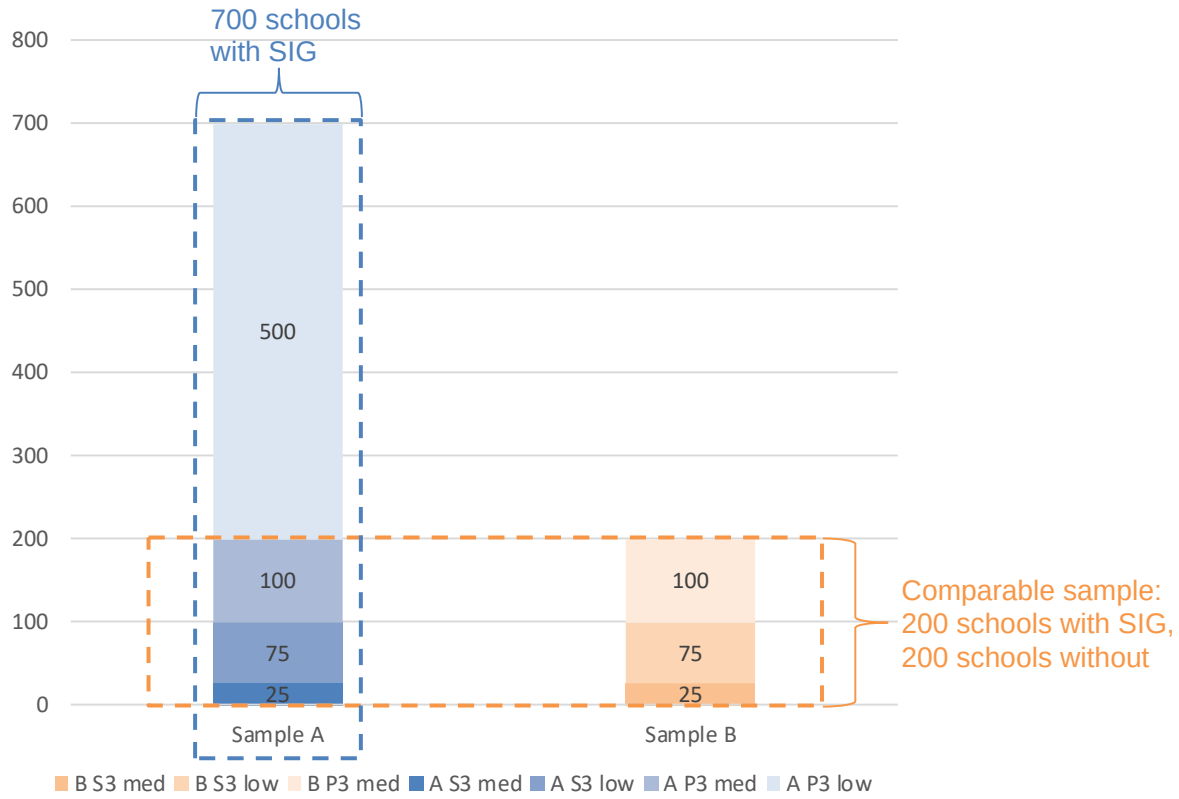
- Key Informant Interviews (KIIs)
    - In-depth, nuanced examination of issues with key individuals
- Focus group discussions (FGDs) with members of School Development Committees
    - Reaches groups of those closest to the beneficiaries
- Survey of Head teachers
    - Wide sample of 900 schools: 700 with SIG for deeper exploration of its impact, and 200 without SIG for comparative analysis
- Analysis of EMIS data
    - National-level background information to contextualise SIG and identify big picture trends.

8. A key feature worth considering up front was our sampling framework for the survey whereby two samples were taken: Sample A which consisted of beneficiary schools in order to investigate the impact of SIGs, and Sample B which consisted of schools that had not received SIGs in order to form a comparison.

9. Sample A was designed to be representative of the recipients of SIG payments and was selected taking into account grant class (85% P3s[2] and 15% S3s in proportion with the grant classes of the recipient schools), income level, and geographical location, as well as meeting the basic criteria of receiving grants 5-6 times over 2015-2020. Sample B, consisting of schools which had never received SIGs or, in the case of P3 schools, had only received SIG payments in 2015, was also selected to be a representative geographical sample, and to be as similar as possible to a sub-group of A in terms of grant class and income, in order that comparisons could be drawn between the two groups. This is illustrated in the graphic below. Further details are available in Annex 3.

[2] In Zimbabwe schools located in low-density urban areas are classified as P1/S1 schools, those in high-density urban areas as P2/S2 schools and those in rural areas as P3/S3 schools.

Figure 2 Illustration of samples A (LowA and CompA) and sample B



Source: Mokoro analysis

10. In Section 4 of the report, the different samples are often contrasted. It should be noted that schools in sample B are not completely the same as schools in the comparable subgroup A, though they are of the same grant class and with similar income levels. The major difference is that while sample A contains a mixture of Registered and Satellite schools, sample B contains only Registered schools, for the simple reason that low income Satellite schools are all recipients of SIGs.

11. It is also worth noting that Special Schools were not included in the survey since they currently account for a very low number of recipients: since the income criteria was introduced for Special Schools in 2016, although as the table below indicates the number of schools is relatively small when compared to in excess of 4,000 schools who benefit from SIGs. The experience of Special Schools was instead captured in FGDs.

Table 1 Number of Special Schools supported by SIG Payments

Year	Special Schools supported by SIG	Total Schools supported by SIG Payments
2013	32	132
2014	32	5215
2015	30	5996
2016	35	3194

2017	11	4033
2018	11	4003
2019	14	4357
2020	15	4531

Source: UNICEF

Ethical Considerations

12. The impact study process was guided by, and consistent with, the United Nations Evaluation Group (UNEG) Code of Conduct for Evaluation in the UN System, Integrating Human Rights and Gender Equality in Evaluations, and Ethical Guidelines for Evaluation. A standardised approach to preparation for and recording of interviews met appropriate ethical and safeguarding principles. All key informants were informed that their interview/discussion data will be used in the study in anonymised and triangulated (with data from other respondents, documents and quantitative data) form.

13. In order to encourage openness, respondents were given the assurance that they will not be quoted or their views otherwise identified individually in this report, unless they provide explicit, written consent. Interview notes were taken in a standardised format and consolidated into an internal interview compendium, which was kept securely and accessible only to study team members.

14. The impact study team members are independent, and no team member had any substantive conflict of interest with the subject of this study. The study team worked freely and without interference and carried out their duties impartially to avoid any potential or perceived conflict of interest. Credibility and objectivity of the final report is enhanced by incorporating feedback from an external, independent reviewer.

Limitations

15. The primary limitation to the study was due to the COVID-19 pandemic. The adjusted workplan excluded travel for all team members to and within Zimbabwe and meant that many interviews were initially conducted remotely. It is recognised that conducting interviews remotely means it is harder to build a rapport with interviewees, and internet connectivity issues at times reduced the ease of conducting the interviews.

16. Furthermore, conducting interviews remotely needed more flexibility from the study team and meant that group discussions were more challenging to arrange and therefore more time was taken on one-to-one interviews. This increased the duration of the fieldwork. The team also found it challenging to reach some stakeholders, particularly in national, provincial and district level government, who were often diverted to attending to issues relating to COVID-19. This was also particularly true for conducting the survey, in which all 900 randomly selected head teachers were interviewed remotely. However, preparation and flexibility from the team meant that the majority of targeted interviews were completed, with stakeholders committing their time to rich discussions conducted remotely, and there were no significant gaps in stakeholder groups reached. Moreover, once Covid-19 regulations were relaxed in Zimbabwe our national partners were able to conduct interviews

in person (in total, 45% of KIIs were done in person), and conduct all ten of the focus group discussions in person.

17. COVID-19 meant that the study team were unable to engage boys or girls or youth in the study. However, the team made efforts to speak directly with the affected population, particularly head teachers, SDCs and district level government stakeholders. They were also able to use secondary sources, such as previous evaluations, to understand beneficiary perspectives.

18. There were limitations around the data. The quality of the data contained within Education Management Information System (EMIS), was sometimes questionable as it is self-reported and, on analysis, contains many apparent errors, although UNICEF have been reviewing the data for many years. There were also issues around the absence of EMIS numbers in UNICEF data on disbursement of SIGs. These were largely dealt with within the context of this study, but swifter analysis, alongside better data management and increased ease of auditing would be possible if school EMIS numbers were in future always included in the information kept by UNICEF on disbursement of SIGs. This would also enable UNICEF to audit the EMIS data more effectively.

19. Finally, as is often the case when analysing the impact of an aid intervention, there was true no control group with which to compare the beneficiaries in order to assess the impact. In the survey, a control group was devised which was close in terms of key indicators to the recipients of SIG payments, but underlying differences remained between the two groups, and thus it is not possible to definitively attribute differences in the two groups as being due to the intervention. See Annex 3 for further details.

2. Country Context

Overview

20. This section provides a brief overview of significant economic, social and policy factors that have affected the School Improvement Grant in Zimbabwe.

21. Zimbabwe is a land-locked country with a population of 15.6m, 40 percent of whom live in extreme poverty, an increase from 33.4 percent in 2018 (World Bank, 2019b). Zimbabwe ranks 109th out of 119 countries on the 2019 Global Hunger Index, and the food security situation is categorised as 'serious' for the 65 percent of Zimbabweans living below the poverty line. This has been further exacerbated the widespread environmental crises such as the 2016/2017 drought, and widespread drought in 2019 leading into 2020 has contributed to an even greater hunger crisis (WFP, 2019). It was recently estimated that 51 percent of the population were in the 'stressed', 'crisis' or 'emergency' acute food insecurity phases (IPC & ZIMVAC: 3).

22. During the 1980s, Zimbabwe boasted a strong agrarian economy, but economic shocks in the early 2000s contributed to a severe decline in living standards as gross national income (GNI) per capita fell from 890 US dollars (USD) in 1990 to USD 330 in 2008 (World Bank, 2019). A crisis was reached in 2008, with one of the highest hyperinflation rates ever recorded globally. Stabilisation measures, both politically with the formation of the coalition government and economically with the introduction of the US dollar as a means

of exchange in 2009, led to a rebound in economic growth. However recent humanitarian shocks (such as a drought and Cyclone Idai), political tensions and currency turmoil have prevented sustainable long-term growth.

23. In an attempt to address the currency turmoil, the real-time gross settlement (RTGS) dollar was adopted as Zimbabwe's new currency on 21 February 2019, bringing together bond notes, and debit card and mobile money payments. In June 2019 it was declared the only legal currency, so that the US dollars used in recent years, even if increasingly scarce, could no longer be used at all. The RTGS currency steadily lost value against the dollar, which led to inflation rates of 300 percent in August 2019 (Aljazeera, 2019), resulting in the reintroduction of denominations of the Zimbabwean dollar. The beginning of 2020 saw the return of the US dollar as acceptable tender in Zimbabwe, although it is expected to be phased out again in the coming years. The economic situation poses immediate operational challenges for UNICEF and other UN agencies. For example, cash transfer programmes are difficult to plan and execute in the context of a volatile economy where cash availability is difficult to predict.

24. By mid-2020, Zimbabwe thus faces a triple challenge of economic uncertainty and hardship (steadily worsening since September 2018), severe drought, and the effects of Cyclone Idai. In addition to all these humanitarian challenges, COVID-19 has exacerbated existing vulnerabilities.

Education sector

25. Zimbabwe has a young population, with 41 percent under the age of 14 (6.6 million of a total 16 million) (World Bank, 2019), but many remain outside the formal school system. Since 2016 there has been a decline in the proportion of school-age children in school. Data from 2019 reports that 17 percent of children between 4 and 17 years were not attending school, largely on account of being turned away for non-payment of fees (Zimbabwe Vulnerability Assessment Committee report, June 2019).

26. Nevertheless, on the legislative and policy front, Zimbabwe has made headway in efforts to create opportunities for the enjoyment of the right to education through policy and legislation. Following the ratification of global and regional treaties (United Nations Convention on the Rights of the Child, and the African Charter on the Rights of the Welfare of the Child), efforts to domesticate these in local legislation have been persistent. This has resulted in a clear commitment to the right to education in the Constitution (Amendment Number 20 of 2013), the Education Act and other Acts, as well as various statutory policy instruments.

27. The Education Amendment Act, 2019 (Act 15-2019) was gazetted on 6 March 2020. Its main revisions include the outlawing of corporal punishment; the provision of sanitary wear to girls; and the Right to Compulsory Basic State-Funded Education, which makes failure to send a child to school an offence, including girls that gave birth. Other significant provisions in support of the right to education include provision for non-formal education, which every school must strive to offer, including adult education; and provision for inclusive education, especially for children with disabilities. A policy option paper on School Financing to support free basic education has been produced; the intention being to develop a school financing policy.

28. Government funding for education increased in absolute terms from USD 796m to USD 1,132m between 2014 and 2019, but in 2020 the budget decreased significantly. As a share of GDP, the education allocation of the total government budget has fallen from the peak of 5.4% of GDP in 2014 to the revised 3% in 2019 (the average for the African continent is about 5 per cent of national GDP). However, compared to 2019, employment costs as a share of the total education budget have been reduced from 86% in 2019 to 44% in 2020 and capital expenditure allocation has increased from 5% in 2019 to 20% in 2020. UNICEF's 2020 Education Brief notes that employment costs have reduced as a result of 'the government fiscal consolidation policy thrust which targeted mainly wage bill cuts' (2020: 7). It may also be noted that the reduction in real term in teacher's salaries, claimed by the Zimbabwe Teachers Association (ZIMTA) to be a reduction of 471.25% due to inflation, has resulted in strikes and claims that teachers can no longer meet even their own basic needs[3].

29. Education Sector Analysis 2015 reported that the amount of money schools raised privately (USD 779 million) was almost equal to the budgetary provision from MoPSE (USD 837 million) (Kageler, 2015). Parents are a significant source of funding for schools, with fees for primary day schools ranging from USD 44 per student in rural areas to USD 700 in urban areas. Even with lower fees in rural areas, the 2015 Education Sector Analysis notes that payment rates are low (below 50 percent in some cases), leading to significant funding problems for schools. The inability of families to pay fees is cited as a major barrier to enrolment and completion for students, and a major driver of educational inequality, because schools with low fees or high non-payment of fees have much smaller working budgets than schools that can charge higher fees.

30. The education sector has not escaped the major shocks that have recently beset Zimbabwe. A recent funding request to GPE[4] notes that:

- teacher salaries have depreciated drastically, leaving teachers unable to support themselves and their families;
- at the household level inability to pay the school fees and levies has resulted in children being pulled out of school;
- grain rationing has disrupted school feeding systems; and
- with the onset of the COVID-19 pandemic and the subsequent school closures, there has been disruption to the education of more than 4.6 million children, with adverse impacts on their protection and well-being, as well as their readiness for school, their attendance and their participation in learning.

[3] https://www.nasdaq.com/articles/zimbabwean-teachers-to-end-strike-after-accepting-41-pay-rise-2020-11-17
[4] Information drawn from *Cover Note for Zimbabwe Covid-19 Accelerated Funding Request*, 16 June 2020 , available at https://www.globalpartnership.org/sites/default/files/document/file/2020%2007%20COVID-19%20AFF%20Request%20Zimbabwe%20-%20Verified.pdf

3. School Improvement Grant Programme in Zimbabwe

Overview of the School Improvement Grant in Zimbabwe

31. The SIG is implemented by MoPSE with support from UNICEF and has been in place since 2013. The grant is a component of the Education Transition Fund (up to 2015) and then the Education Development Fund (EDF, 2016–2020, followed by EDF II). All funds from SIGs are contributed by the current partners of the EDF: FCDO and the German Development Bank (KfW) as the table below illustrates. Support from the European Commission ended with the ETF.

Table 2 Donor Contributions, USD, 2015 - 2020 (source: UNICEF)

Donor	2015	2016	2017	2018	2019	2020	Total (2015-2020)
European Commission	4,948,481						4,948,481
KFW	12,680,601		4,341,203	8,743,000	5,602,298	11,376,423	42,743,526
FCDO	8,278,939	10,000,985	9,495,293	5,229,552	4,332,979	2,408,991	39,746,739
Total	25,908,021	10,000,985	13,836,496	13,972,552	9,935,277	13,785,414	87,438,746

32. The expectation was that this process will lead to a phased reduction in compulsory education costs for parents, especially the poor and vulnerable. In addition, by investing resources at the school level, it was hoped that a 'whole school approach', addressing not only issues related to teaching and learning, but also community involvement in the school, would be strengthened. A 'whole school approach' envisages that the community, school authorities and children will assess the key challenges and barriers to school effectiveness and develop a School Development Plan (SDP) to prioritise problem areas, set out solutions and formulate strategies to realise desired changes.

33. There is a clear segregation of functions in the implementation of the SIG in schools. MoPSE is the custodian of the programme and it regulates activities and acts as the final arbiter. UNICEF is the fund holder and technical partner and is responsible for the payment of the grant directly to the beneficiary schools' bank accounts.

34. The SIGs are disbursed directly to a dedicated school bank account from a UNICEF account (the diagram in Annex 8 depicts the full payment process) and have been used to address issues of access, quality, governance and resourcing within the context of specific needs articulated in a school's SDP. Payment of SIGs is also based on submission of all required information and acquittal of the previous year's grants, and that the school has a valid and approved School Development Plan.

35. Selection criteria have a strong equity focus, and although they have been adjusted over the years typically have taken into account school income, grant class, and distance

from the district office[5]. A quick snapshot of how the selection criteria have shifted over time can be seen in the following table.

Table 3 SIGs' Selection Criteria, 2017 - 2020

2017	2018	2019	2020
• Registered P3 with average 2014-2016 income less than $15,000 • Satellite Primary with average 2014-2016 income of less than $20,000 • Satellite Secondary with average 2014-2016 income of less than $20,000 • Special Schools with average 2014-2016 income of less than $100,000 • All schools (P3 and Satellite) with enrolment under 60 students	• Registered P3 with average 2014-2017 income less than $15,000 • Satellite Primary with average 2014-2017 income of less than $20,000 • Satellite Secondary with average 2014-2017 income of less than $20,000 • Special Schools with average 2014-2016 income of less than $100,000	• Satellite schools (Primary & Secondary) with average income (2016-2018) equal or less than $20,000 • Registered Rural P3 school with average income (2016-2018) equal or less than $15,000 • Distance from the district office. This only applies to Satellite and Registered schools. • Special schools with average income (2016-2018) equal or less than $175,000 Performance reward- $500 • Retention rate up to Grade 7 above 75% for Primary schools • Retention rate up to Form 4 above 75% for Secondary Satellite schools	SIG Equity focused • Satellite schools (Primary & Secondary) with average income (2016-2018) equal or less than $20,000 • Registered Rural P3 school with average income (2016-2018) equal or less than $15,000 • Distance from the district office. This only applies to Satellite and Registered schools. • Special schools with average income (2016-2018) equal or less than $175,000 Performance reward- $500 • Retention rate up to Grade 7 above 75% for Primary schools • Retention rate up to Form 4 above 75% for Secondary Satellite schools

36. There is a robust and clear mechanism that MOPSE has in place, which UNICEF supports, to ensure all funds reach schools and the steps to be taken if any misappropriation of funds occurs. Verification findings and monitoring reports are used to inform the utilisation criteria, and uncover, if any, ineligible expenditure or unaccounted funds.

37. MoPSE has zero tolerance towards fraud, and therefore not only has in place a rigorous process to prevent the misappropriation of funds, but also has implemented procedures to manage the return of any funds misappropriated by schools. This process includes MoPSE:

- Identifying cases of misappropriation either through SIG verification reports, or a whistle-blower, or by MoPSE through internal audit reports;

[5] Although outside the review period for this impact study, the 2021 selection criteria now identify schools without water for additional resources. This again illustrates how SIG criteria are being regularly adapted to ensure SIGs becomes even more equitable.

- Sending a team to investigate the allegations (there is a Disciplinary Unit within MoPSE for this purpose, comprising of personnel from the Disciplinary Unit, Finance and Legal);
- Carrying out the investigation (cases are assessed according to the nature of the infraction, which in turn determines the disciplinary procedure to be followed); and
- Charging the accused, according to regulations, and if found guilty the amount misused is deducted from their pension or salary services bureau.

38. In instances where it is not a case of fraud, such as an issue where a school purchased ineligible items using SIG funds, then the Head is asked to return the SIG funds and purchase eligible items and submit receipts as proof. In order to track progress of cases, a fraud matrix has been developed and is updated on a quarterly basis (i.e. tracking progress on the extent to which monies have been recovered until the case is closed). Progress is also routinely shared with the Education Coordination Group (ECG), until each respective case has been closed.

39. How a grant is spent is also based on the utilisation criteria, which stipulate eligible and non-eligible items (see Annex 9 – shifts in utilisation eligibility criteria). Since inception, the utilisation criteria have been reviewed regularly, taking into account the available funds and the prevailing financial situation in the country, to ensure that the grant benefits the most in need. The utilisation criteria basically establish the components of 'school functionality' each year. Verification findings and monitoring reports are also used to inform the utilisation criteria, and uncover, if any unaccounted funds. Verification studies (typically assessing expenditure of roughly 10% of all SIG recipient schools) have found

- Minimal evidence of unaccounted funds - in 2018 it was US$1,333.90, in 2017 it was US$662.43, and in 2016 it was US$1,801.18;
- A gradual improvement in schools' ability to process and retain original invoices (up from 85% of SIG recipient schools in 2016 to 96.3% of all schools by 2018);
- A decrease in the total value of expenditure on ineligible items (down from 3% of total disburse in 2016 to 1.97% by 2018); and
- Extensive efforts by MoPSE to follow up and claim back unaccounted funds, cases which are pursued until the matter is satisfactorily closed.

40. The SIG has evolved in terms of the schools it covers (as shown in the table above) and the amounts it disburses; the table below gives the criteria and the amount of the standard grant for all years of SIG payments, 2013-2020.

Table 4 SIG payments & schools reached, 2013-2020[6]

Year	Standard Payments (USD)					Total disbursed (thousands USD)	Total schools reached
	Special schools	Regular P3s	Satellite Primaries	Satellite Secondaries	Regular Secondaries		
2013	20,000	4,366	4,312	6,280	10,000	1,213.57	132
2014	20,000	4,366	4,312	6,280	10,000	23,357.62	5215
2015	20,000	3,000	6,500	6,500		24,413.00	5996
2016	5,000	2,000	4,000	4,000		9,605.00	3194
2017	10,000	3,000	4,500	5,000		14,742.00	4033
2018	10,000	2,000	4,500	5,000		11,833.00	4003
2019	10,000	2,000	2,000	2,000		10,082.00	4357
2020	Not stated	2,600	2,600	2,600		13,680.90	4531

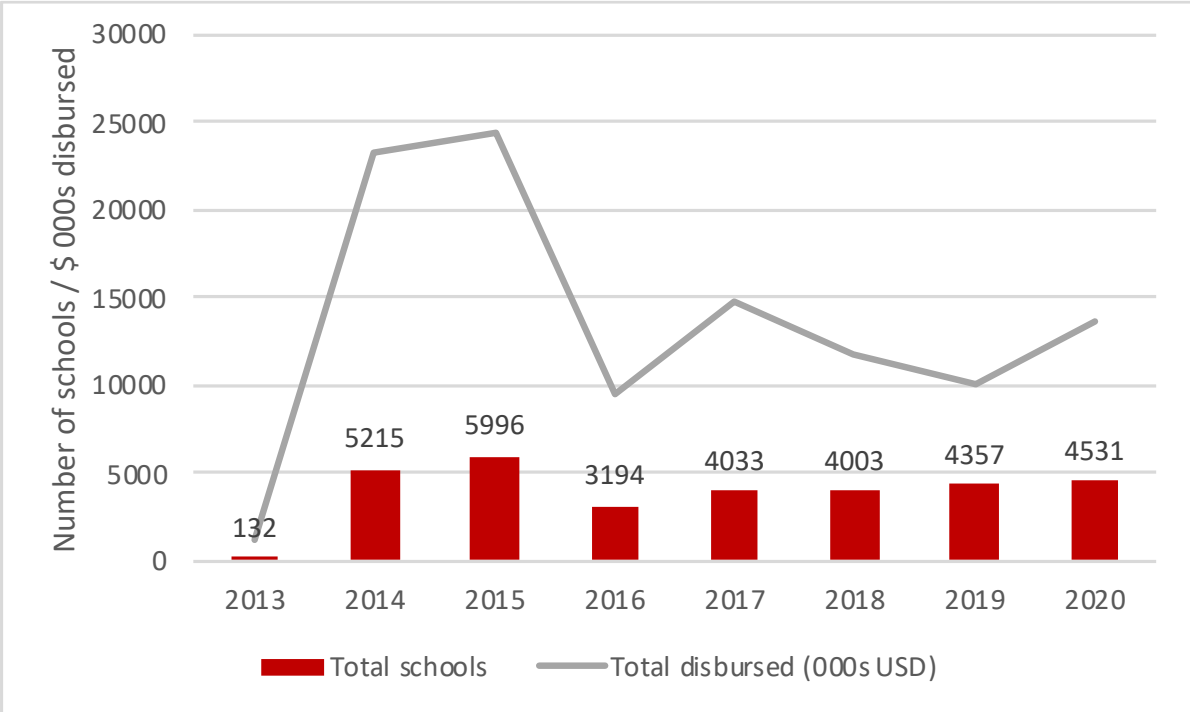
Source: UNICEF data, Mokoro analysis;.

41. As the table shows, the SIG criteria have been reviewed and altered on an annual basis. There was been increasing emphasis on the income level of schools, targeting only the poorest alongside Special Schools. The size of the grant has decreased from a high point around 2014/15. However, in 2020 there was a slight upturn in both the size of grant and the number of schools covered compared with the previous year.

42. The graph below gives a high-level view of the total number of schools reached and the amount disbursed on an annual basis. While both of these figures peaked in 2015, there has since been some increase from its low point the following year in 2016.

6 note: in addition, a performance payment of $500 was given in 2019 and 2020 to schools with a retention rate up to grade 7 above 75% for Primary; retention rate up to form 4 above 75% for Secondary Satellite; extra funds were also given in 2019 and 2020 depending on the distance of the school from the District Office, $100-$200 per school were awarded in 2019, and in 2020 this rose to $100-$300 additional payment.

Figure 3 Annual disbursement & total schools reached, 2013-2015



Source: UNICEF data, Mokoro analysis

43. From 2013 to 2020, approximately USD 109 million were spent on SIG payments, hence the need to conduct this study and establish whether the programme has produced the intended outcomes and impact.

SIG Complementary Funding and SIG Emergency Funding

44. Whilst the focus of the impact study is the EDF-funded SIGs, there are two other funding grants that complement the SIG, although they target very specific schools and regions in Zimbabwe. The first is **Complementary Funding** (funded by Global Partnership for Education), which supports the efforts of disadvantaged schools to improve their infrastructure, for example by building classrooms, WASH facilities and science laboratories.

45. SIG Complementary Funding adopted the regular EDF-funded SIG modality to disburse and account for funds, by directly sending funds to schools' dedicated accounts. Its selection criteria are as follows:

- the schools had had construction projects stalled for a minimum of two years;
- they were in a very poor community;
- their funds were exhausted;
- parents were unable to pay levies for construction; and/or the infrastructure had been destroyed by natural disasters

46. In 2019, a total of 194 schools received the GPE-funded SIG Complementary Funding, of which 187 received USD 5,000 each for classroom construction and seven received USD 10,000 each for building a science laboratory.

47. The second grant is known as **SIG Emergency Funding**. Following the effects of Cyclone Idai in the eastern part of the country, in order to respond to the emergency and ensure continuity of learning in the worst-affected schools, USD 162,000 was made available. Using the same methods as the EDF-funded SIG, SIG Emergency Funding was disbursed to a total of 54 cyclone-affected schools (USD 3,000 each) for quick repairs and minor renovation of the damaged school infrastructure, as well as to replace lost/damaged materials such as furniture, and cups and plates for school feeding.

4. Impact Study Findings

48. Impact study findings are presented in line with the Impact Study Questions (Annex 4), but have been slightly reordered in order to enhance the logical flow of this section of the report. We begin by examining the extent to which SIG payments provided targeted funding to the schools that need it most. We then examine the extent to which SIGs has contributed to school functionality, its impact on learning and access. We end this section of the report by considering whether the size of the grant is sufficient, before examining perceptions of the SIG more generally, and identifying areas which key informants believe needs to improve.

Targeting of the SIG

To what extent did SIGs provide well-targeted funding to financially constrained schools to cover non-personnel/non-capital resource demands?

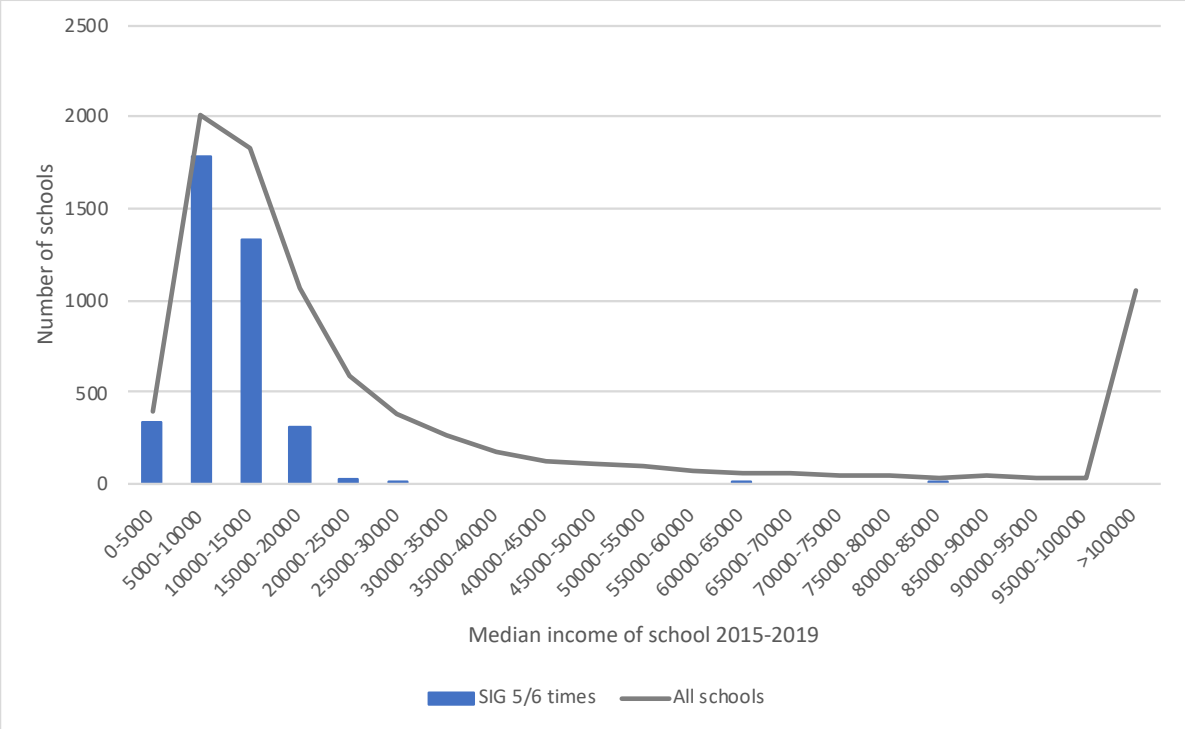
49. SIGs are intended to target the schools which are most financially constrained and lack basic resources. As seen in the section above, the targeting takes into account a combination of Grant Class, Registration Status, average annual income, and distance from the District Office. In addition, all Special Schools were initially included, though since 2017, Special Schools were only included if their income was below a certain level ($175,000 in 2020), reducing the number of Special Schools eligible from 35 to around 14. Of the remainder, the majority are P3 Registered schools (65%) and Primary Satellite schools (20%) with an income less than $15,000, and S3 Satellite schools with an income less than $20,000 (14%).

50. It should be noted that Zimbabwean schools nationally are hugely varied in terms of income, and cover small rural schools to large boarding schools of international renown, including some of the best schools on the continent. While over 5,000 schools, equivalent to more than half the schools in Zimbabwe, have a median annual income of less than 20,000 USD, there are also over 1,000 schools which enjoy an income of over 100,000 USD, and 100 schools with an income of over 1 million USD[7]. It is therefore essential that SIG payments are correctly targeted to meet those genuinely in need.

[7] These figures are all based on Mokoro analysis of EMIS data, 2015 – 2019. See note on data limitations for caveats associated with EMIS data.

51. The graph below shows schools which received grant payments 5 – 6 times over the period 2015 – 2020 according to their median income 2015 -2019. This graph clearly illustrates that SIGs has been effective in targeting low-income schools.

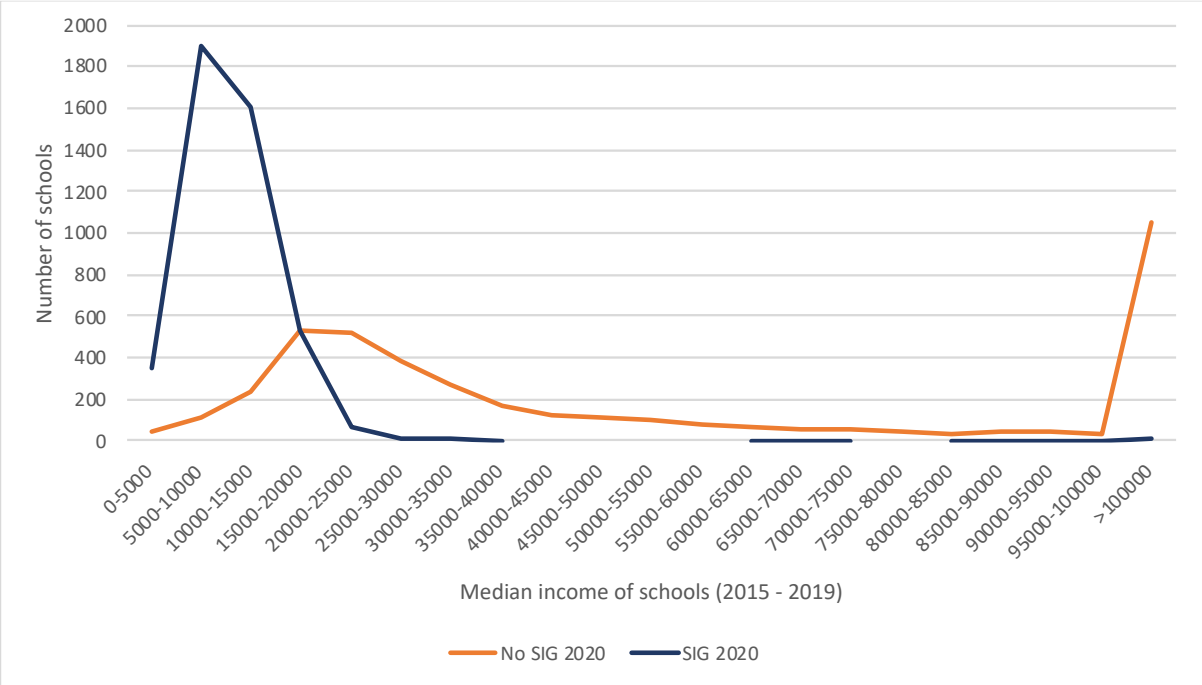
Figure 4 SIG recipient schools & all schools by median income



Source: EMIS data; Mokoro analysis

52. Zoning in on schools that received SIGs in 2020, once again, our analysis of EMIS suggests that it is predominantly low-income schools that receive SIGs, indeed 97% of schools receiving the grant had a median income of less than 20,000 USD.

Figure 5 Income distribution of schools receiving SIGs in 2020 and those not



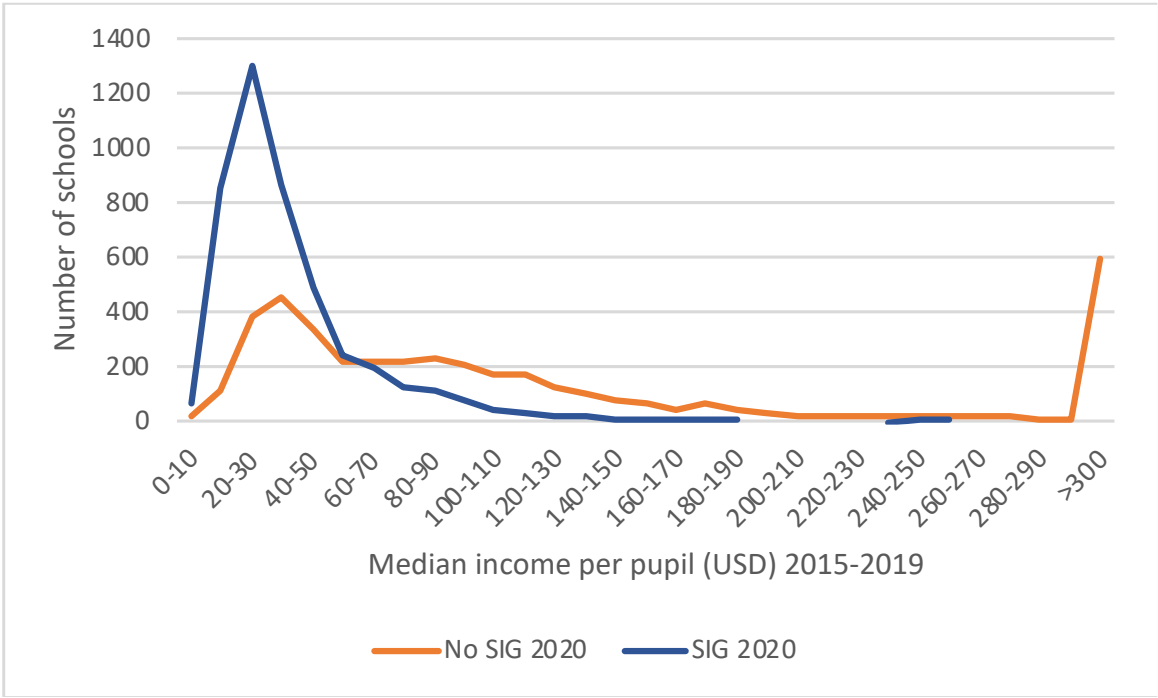
Source: EMIS data & UNICEF SIG data; Mokoro analysis

53. SIGs are targeted towards the poorest schools and reaches 91% of schools with an income of less than 15,000 USD. However, there appear to be a limited number of schools of low income which are not receiving SIGs. These appear to be schools that do not fall within the SIG criteria and consist principally of registered S3s, some P3s that have received a large grant in the past, as well as some low income P2s[8].

54. Given that SIGs were targeted based on the absolute income of the school, with no allowance for different size of school, we analysed income per pupil to see if the grant was inadvertently penalising large schools. The graph below illustrates that, once again, the vast majority of the less well-off schools, this time measured in terms of income per pupil, received SIGs. 80% of schools receiving less than 30 USD per pupil received SIG payments in 2020. However, once again, there were some schools that had a low income on a per capita basis and did not receive the grant. These were mainly large Registered P3 schools with an income in excess of $15,000, as well as schools which fall outside the SIG criteria on other grounds such as Grant Class.

[8] We have prepared a list of these low-income schools, roughly 170 schools, which we can provide to UNICEF and MoPSE for your consideration. None of the schools received SIGs in 2020, yet their income in 2019 is less than 15,000, and whose median and mean income between 2015-2019 are less than 15,000 (Sources used: EMIS and UNICEF list of SIG schools).

Figure 6 Income per pupil of schools receiving SIGs & those without[9]



Source: EMIS data & UNICEF SIG data; Mokoro analysis

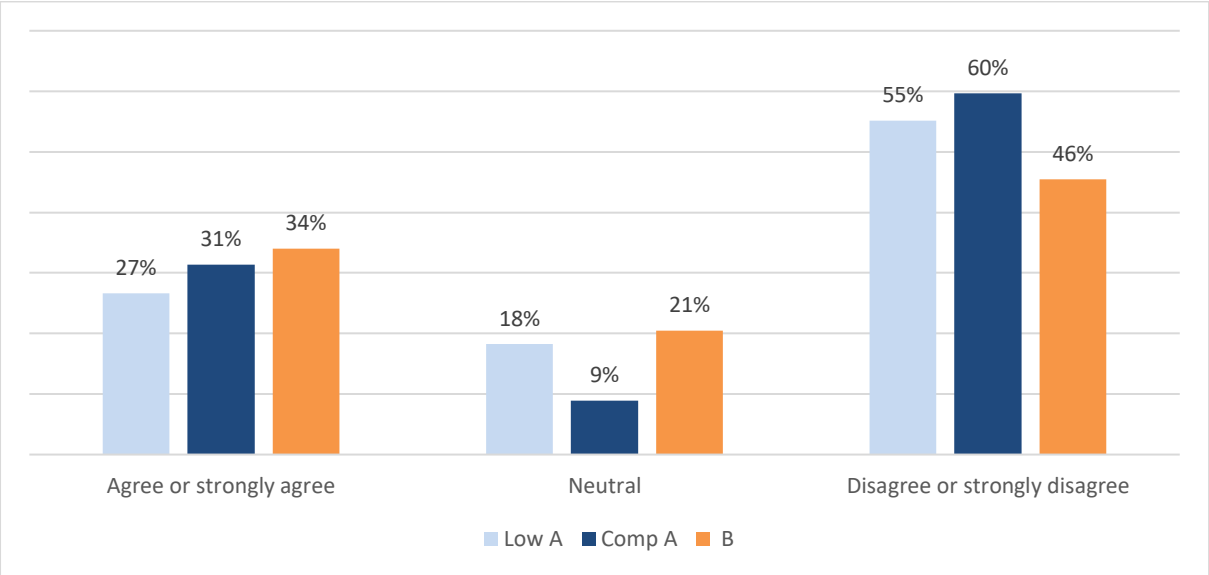
55. Given the fixed sum nature of the grant, it is fair to note that the SIG is of greater benefit to small schools and may, on a minor level, be biased against bigger schools. Fortunately, in equity terms, smaller schools tend to be lower income in Zimbabwe, so this issue is not as bad as it might be, and while it would be possible to construct a formula to more accurately target the poorest schools, any advantage thereof would need to be weighed against the advantages of retaining the simplicity of one fixed payment given under clear stipulations.

56. Moving from this high-level consideration of the SIG and school income, to a consideration of parents' ability to pay, our analysis of the survey data found that the SIG has been successful in targeting schools where parents are less able to pay tuition fees and development levies. Parents of children going to schools targeted by SIG payments, sample A, were less likely to be able to pay fees and levies than those in sample B, and this was true also of the sub-group comparative A ('Comp A') compared with B.

57. Note here and throughout: Sample A consists of SIG recipient schools and sample B of schools without SIGs. 'Low A' refers to low-income P3 schools in Sample A, which make up the majority of recipients of SIGs; 'Comp A' refers to the comparative sample in Sample A consisting of P3 and S3 schools, while B refers to P3 and S3 schools of a similar income level to those in the comparative A sample but which do not receive SIG payments.

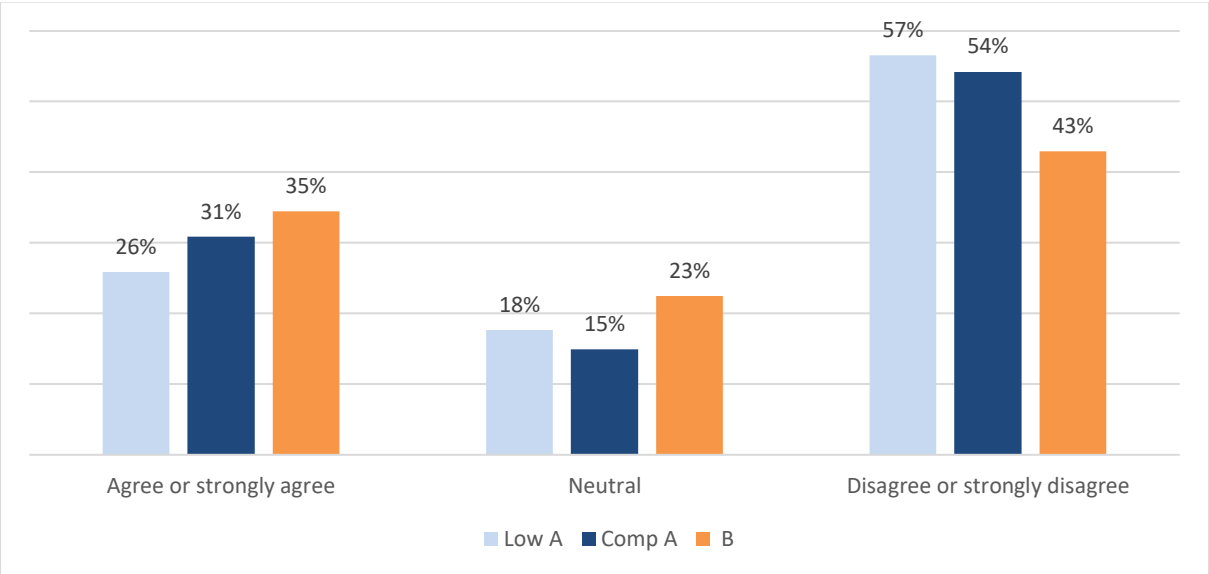
[9] We have prepared a list, which can be shared with MoPSE and UNICEF for consideration, of the 72 schools which were shown in the graph to receive SIGs in 2020 and have over $300 income/pupil in 2019, almost all of them had a much lower income in previous years.

Figure 7 Parents are able to pay the fees of the learners at our school



Source: School survey; Mokoro analysis

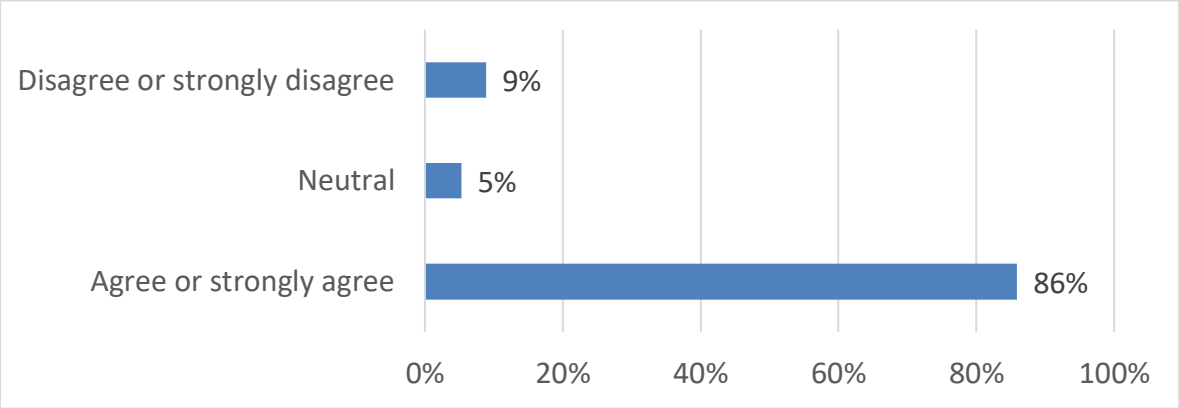
Figure 8 Parents are able to pay the levies of the learners at our school



Source: School survey; Mokoro analysis

58. Furthermore, on a qualitative level, there was almost unanimous agreement among the head teachers of SIG beneficiary schools that the grant is appropriately targeted.

Figure 9 Extent to which head teachers agree that the SIG is targeting the most vulnerable schools



Source: School survey; Mokoro analysis

59. In summary, as a result of our analysis of the distribution data of SIGs and also based on the findings of the survey, we found that the grant undoubtedly targets low-income schools. We did however also find that a small number of schools which should be targeted are just missing out.

School functionality

To what extent did SIGs contribute to improved school functionality?

60. In answering this question, the impact study team examined whether the grant is targeting the right things, to what extent the grant contributed to ensuring school functionality, and then we examined the extent to which improved school functionality contributed to a more learning environment.

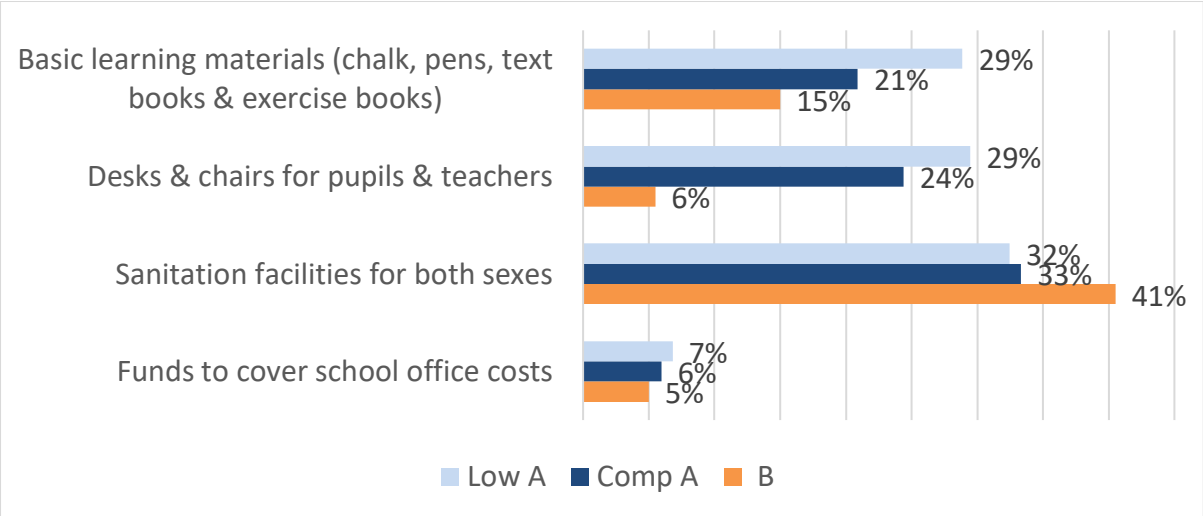
61. MoPSE have developed extensive minimum (functionality) school standards, which cover 13 distinct criteria[10]. Whilst it is beyond the scope of this impact study to cover MoPSE's comprehensive set of standards (primarily because the standards cover several 100 distinct measures, most of which fall outside the aegis of the SIG eligibility criteria), it is nevertheless instructive to establish to what extent, by targeting certain components of the school (i.e. those that fall under the SIG eligibility criteria), the grant has made a difference.

62. Interviews and FGDs were unanimous in the view that SIGs are making a noticeable contribution to alleviating the situation of the financially constrained schools through stringent targeting criteria. The SIG is seen to be covering the right things, especially as it has a largely developmental rather than consumptive thrust. Whilst the grant does cover some consumable items (such as stationary), its primary focus is on meeting school needs (developmental) and so the sense is its benefits will be felt for some time.

[10] The 13 standards (each standard includes multiple sub-standards) were drawn up by then Ministry of Education Sport, Arts and Culture in 2013. Standards include issues such as school management, governance, staffing, teaching and learning processes facilities, discipline and development, safety and security, and boarding facilities.

63. The survey findings confirm the qualitative views, in particular the finding that SIGs have been able to cover and accomplish some key projects in the broader realm of improvements in the teaching and learning environments – physical environment, teaching and learning materials, water and sanitation, furniture - to the extent that any grant can support these issues.

Figure 10 Extent to which Schools believe they have sufficient resources at school

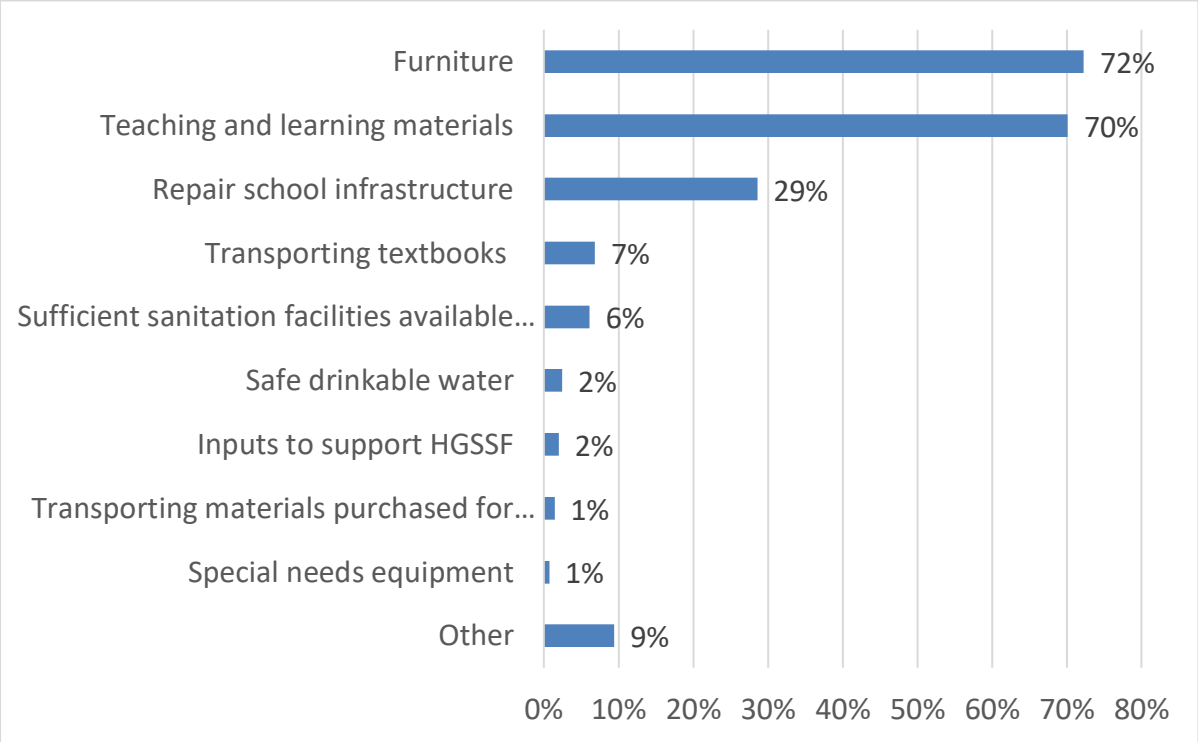


Source: School survey; Mokoro analysis

64. Our survey of head teachers found that schools benefiting from SIG payments were more likely to have basic learning materials and school furniture compared with the sample without the grant (Figure 10). However, they were less likely to have adequate sanitation facilities, which is likely due to the SIG targeting satellite schools which have fewer facilities. For all samples, around 90% did not believe that they had sufficient funds to cover office costs such as stationery and printer ink.

65. The survey revealed that purchase of school furniture and teaching & learning materials were the most common uses of the grant.

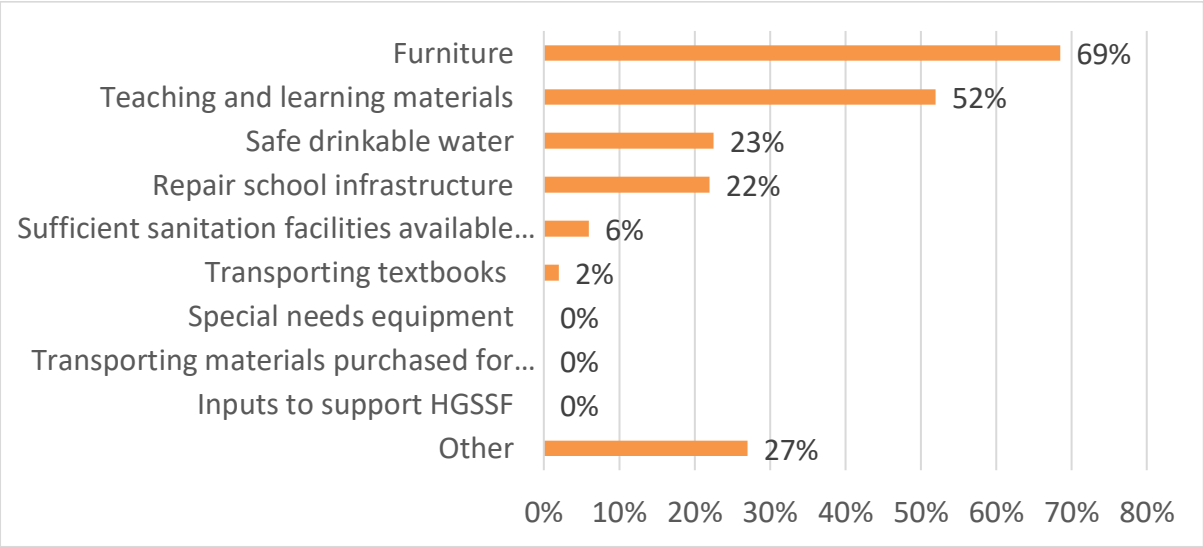
Figure 11 The two most important things that SIGs have improved at your school



Source: School survey; Mokoro analysis

66. This appears to align well with the needs of low-income schools, as further evidenced by 'wish list' of non-SIG schools.

Figure 12 The biggest resource needs of schools not receiving SIG payments



Source: School survey; Mokoro analysis

67. When respondents were asked (as a separate, open-ended question in the survey) what is the main disadvantage of the SIG eligibility criteria, the most commonly cited criterion was that the eligibility criteria no longer allow for the construction of buildings (as opposed to minor repairs). Head teachers also cited construction of new infrastructure (such

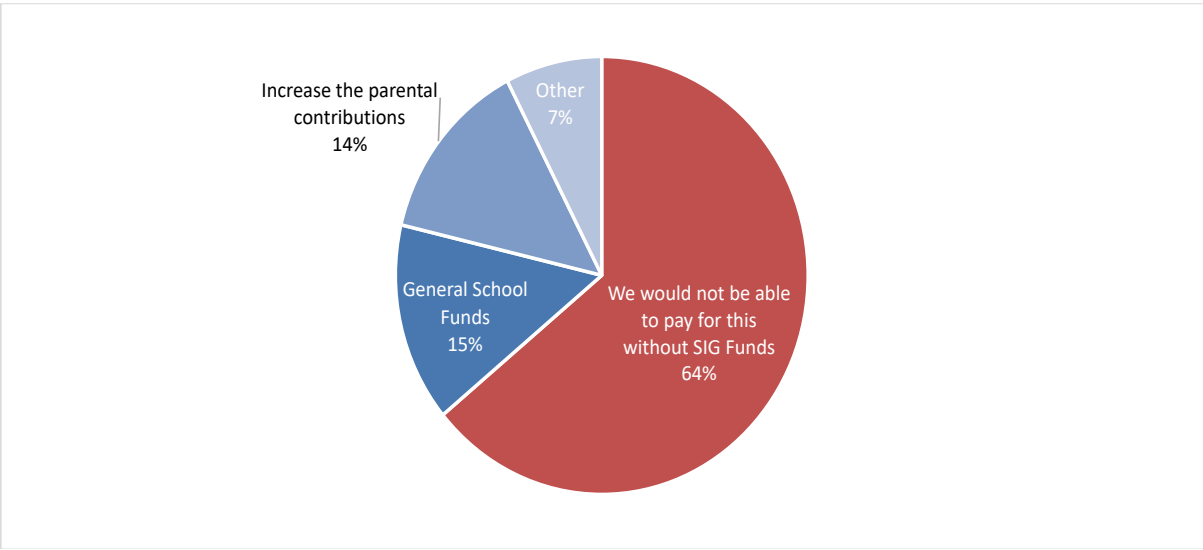
as classrooms) as the biggest need not being met by SIG payments. FGDs and KIIs also cited this as a major challenge, noting also that as the grant amount has decreased over the years it would be insufficient anyway for major construction. FGDs and KIIs also pointed to the success of both the Complementary Funding Grant and the SIG Emergency Grant in addressing major infrastructure needs of schools, at the same time ensuring that funds were used appropriately and could be accounted for and recommended that lessons could be learned from distribution of Emergency/ Complementary grants for infrastructure to guide the SIG process more widely.

68. Inputs to support income generating activities, transporting materials, and special needs equipment were the three areas which head teachers ranked the lowest in terms of what the grant had improved at their school (head teachers from Sample A). These three areas were also the lowest ranked need by head teachers at schools not receiving SIG payments (head teachers from Sample B). These findings with regards to use of the grant are closely aligned to what the annual independent SIG Verification Studies over the past five years (2016 – 2020) found (see text box). These same verification studies also noted that where income generating activities were being implemented more than half had yet to realize any proceeds from the activities that were being implemented.

- Teaching and learning materials
- Furniture
- Infrastructure, construction and rehabilitation projects
- Water and sanitation
- Income generating activities
- School running costs
- Special needs provisions

69. Survey respondents were unequivocal that without the grant improvements would not have happened (see Figure 13).

Figure 13 How would you pay for these improvements listed if there was no SIG payment?



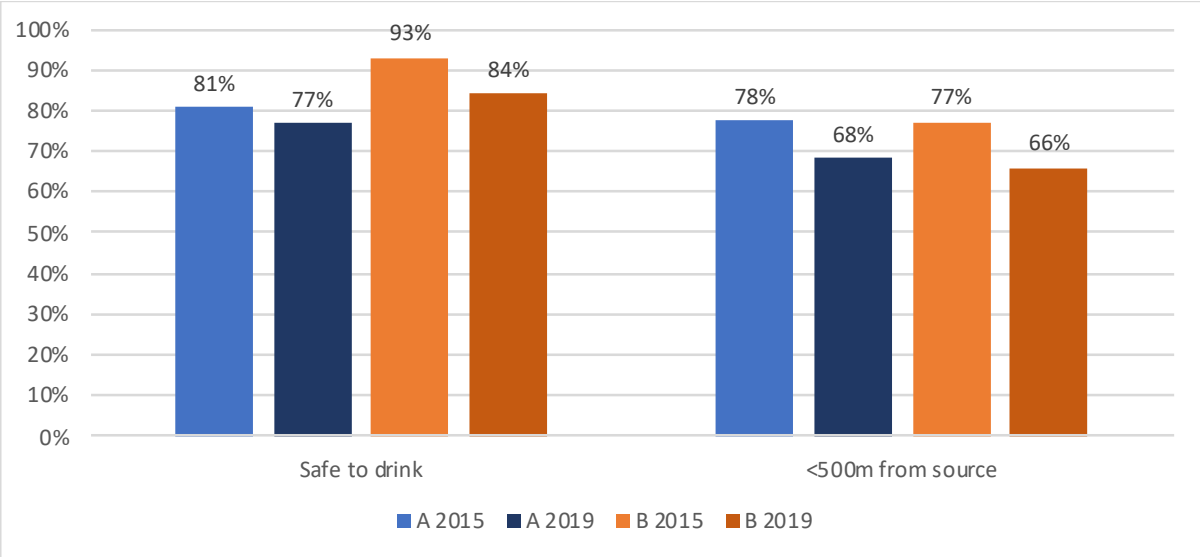
Source: School survey; Mokoro analysis

70. From 2021, an additional payment will be made to schools which are more than 500m from a water source. Examination of EMIS data indicates that 68% of the schools that received SIGs in 2020 are less than 500m from a water source, compared with 81% of schools that do not receive SIGs. In our comparative sample, however, the figures for both

schools with and without the grant are approximately the same, indicating that improved WASH is a wider need beyond the schools currently receiving the SIG.

71. Considering wider WASH indicators, availability of water that is safe to drink has decreased from 2015 to 2019, and this is the case for schools with and without SIG payments. This was the case both nationally as well as within our sample. Notably, however, schools receiving SIG payments had lower access to safe water than those without. This echoes the finding in the survey on sanitation facilities, and likely reflect the fact that schools which receive SIGs are more likely to be satellite schools with fewer facilities.

Figure 14 Schools in sample with safe water and <500m from water source, 2015 & 2019



Source: EMIS data & School survey data; Mokoro analysis; note: A refers to sampled schools receiving SIG, B to schools without SIG; data given for years 2015 and 2019

72. Informants spoke of the fact that SIG payments had led to children being proud to associate with a renovated school, increased enrolment, improved attendance, less dropping out. Others spoke of children spending more time at school where they can sit at own desks compared to previous times when the floor was just dust or if cemented, cold in winter. In one of the schools visited children have been allocated individual desks, the school heads indicated there was heightened accountability with learners taking care of the furniture; cleaning the desks all the time and ensuring no-one damaged it. Another head teacher spoke of how there was improved participation in sporting activities, all because they now have new balls and new sports uniforms.

73. KIIs and FGDs also noted that the grant had improved the physical conditions of schools. For instance, schools have repaired buildings, ramps that never existed before to ensure better access, and in many schools visited there was evidence of an improvement in appearance through repairs, and walls being freshly painted. Other examples cited included:

- Use of decent toilets rather than queuing for the single squat hole or using the bush instead

- Improved sharing ratio for learning materials, a number of schools achieved 1: 1 for textbooks
- Decent sitting and writing spaces that came with the provision of new furniture

74. A noticeable effect on the school environment has been in terms of water and sanitation. One head teacher, commenting on how provision of new toilets had changed practices at the satellite secondary school said:

> *There are no more queues for the one squat toilet. The use of bush toilet that had emanated from impatience in the queue is no longer a practice in this school. In addition, girls who would go absent during their menstrual periods can now use our new facilities in confidence*.

75. The responsive nature of the SIG to national priorities, which has also contributed to school functionality, can be seen in both the SIG Complementarity Grant and the SIG Emergency Grant. In both instances these were introduced to take care of emergent needs in select schools.

76. Moreover, the grant has contributed to helping schools function during the pandemic. When COVID-19 struck, schools were allowed to fund procurement of Personal Protective Equipment (PPEs) for staff and learners. It is encouraging that the utilisation criteria were flexible enough to be adapted to the emerging situation.

Impact on learning

To what extent did improved school functionality contribute to a more conducive learning environment?

77. The provision of basic school supplies, such as textbooks, sports equipment, and classroom furniture, as funded by the grant, were seen by those interviewed to have to improved the teaching and learning conditions, and positively influenced attitudes and performance of learners. There was agreement that the grant is targeting those aspects that closely link with school functionality to enable learning to take place - learning materials, water and sanitation, amongst others. SIG payments are also seen to be funding the right non-personnel things that have a bearing on how children learn. In most of the schools visited, it is obvious that SIG-financed learning materials have had a great influence on learning:

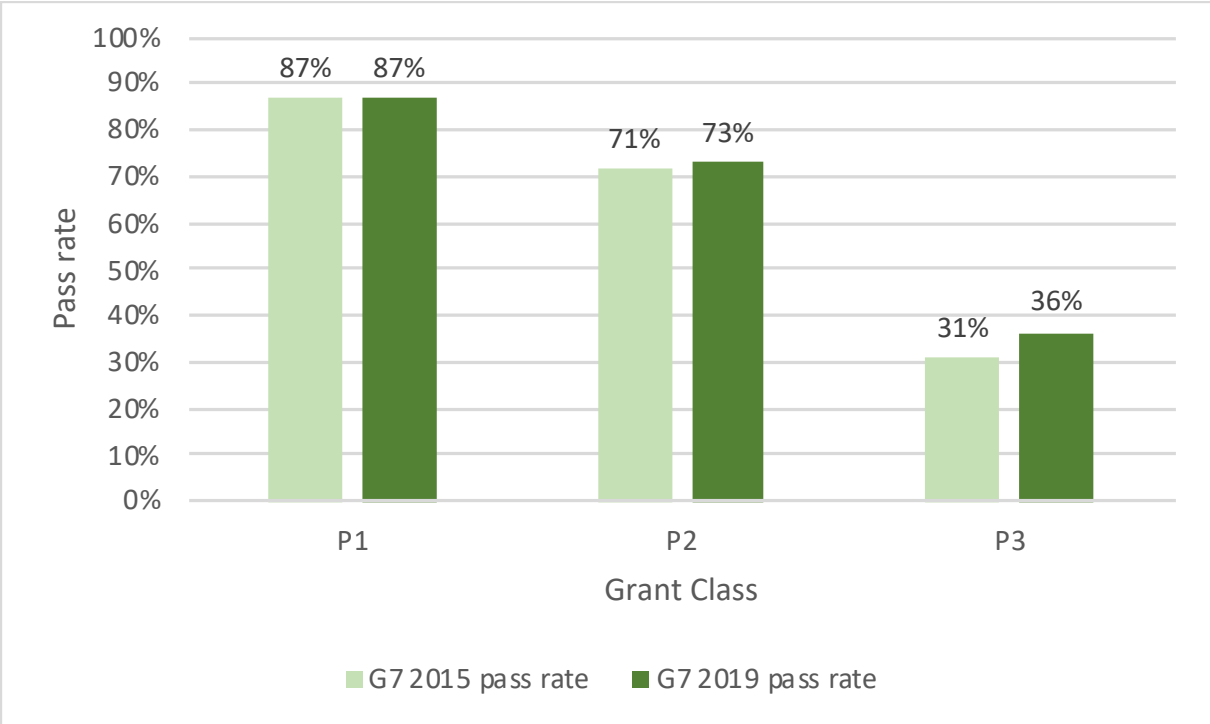
> *"Pupils now able to carry textbooks and go home with them to read and also help them when doing their homework. The textbooks have also helped - when children are on a free period they can spend that time reading instead of making noise like they used to do before."*

78. An improvement in pass rates was something that was noted anecdotally by several head teachers, who attributed the improvement to the increased availability of textbooks and the provision of school desks for all pupils.

79. Our analysis of EMIS data found that pass rates have indeed improved for schools receiving SIGs, when we examine pass rates for the national Grade 7 exams[11]. Whilst P3 schools have always lagged behind other schools, unsurprising bearing in mind they are the poorest schools in Zimbabwe, the gap is closing between P3 schools and other schools as a result of SIGs.

80. High-income primary schools, P1s, have a higher pass rate than P2s, which in turn have a considerably higher pass rate than P3s. While the pass rates of P3s have improved more than the pass rates of the P1s and P2s over the last five years, even so, the average pass rate of 36% for a P3 pupil in 2019 remains less than half that of a pupil in a P2 school. It could further be noted that the number of candidates for G7 from P3 schools fell during this period, from 246,000 in 2015 to 235,000 in 2019, whereas the number of candidates from P1 and P2 schools rose slightly in the same period (from 81,000 in 2015 to 85,000 in 2019 for P1 and P2 combined).

Figure 15 G7 pass rates by Grant Class, 2015 & 2019

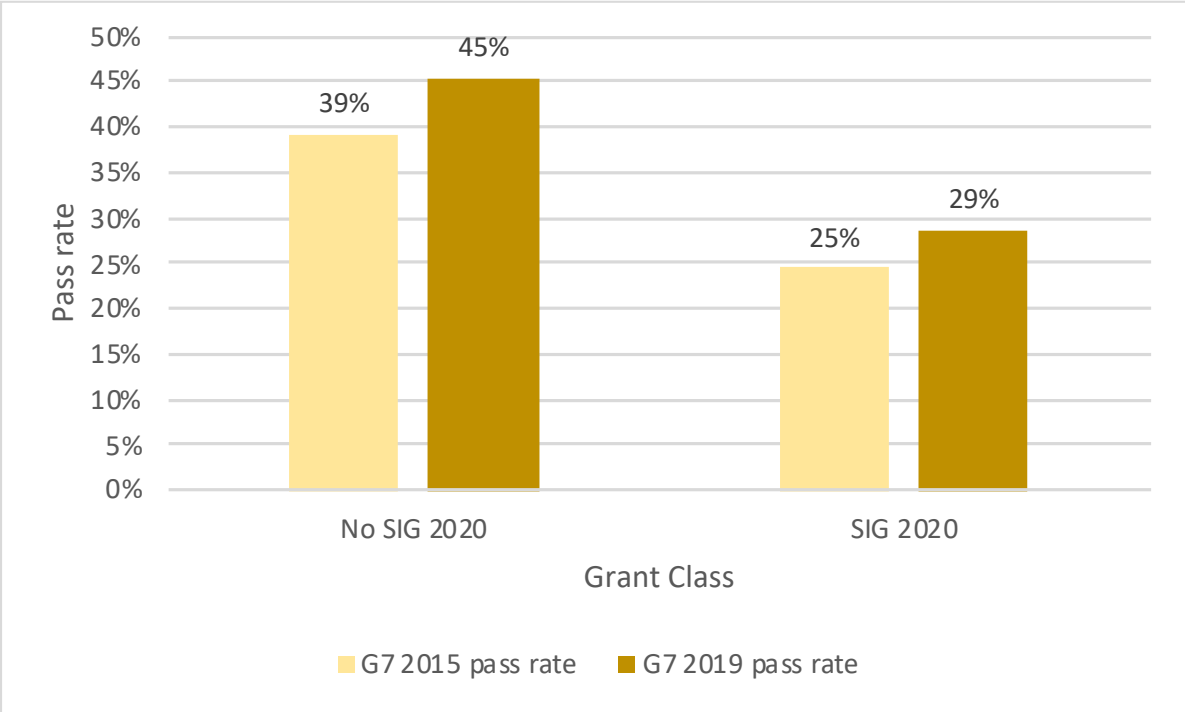


Source: EMIS data; Mokoro analysis.

81. Considering just the P3 schools, a similar difference in pass rate can be seen between the lower-income P3 schools that receive SIGs and the higher-income P3 schools that do not. Once again, the pass rate, while improving across the board, is considerably higher for schools without the grant, i.e. schools with a higher income.

[11] The examinations are overseen by the autonomous Zimbabwe School Examinations Council (ZIMSEC), who have full authority over all aspects of the examination including setting the examinations, marking and moderating the examinations, and so on.

Figure 16 G7 pass rates for P3s with and without SIG payments, 2015 & 2019



Source: EMIS & UNICEF data; Mokoro analysis.

82. Both these graphs above illustrate the difficulties in analysing the impact of the SIG. Because lower-income schools perform less well in general, and the SIG is allocated almost exclusively to lower income schools, the impact of the grant can be difficult to isolate.

83. With this in mind, to analyse the impact of the SIG on the performance of schools at Grade 7, the results of schools in our sample were considered, allowing us to compare schools of similar income levels which may be considered a fairer comparison, though, as noted above, differences between the two groups remained.

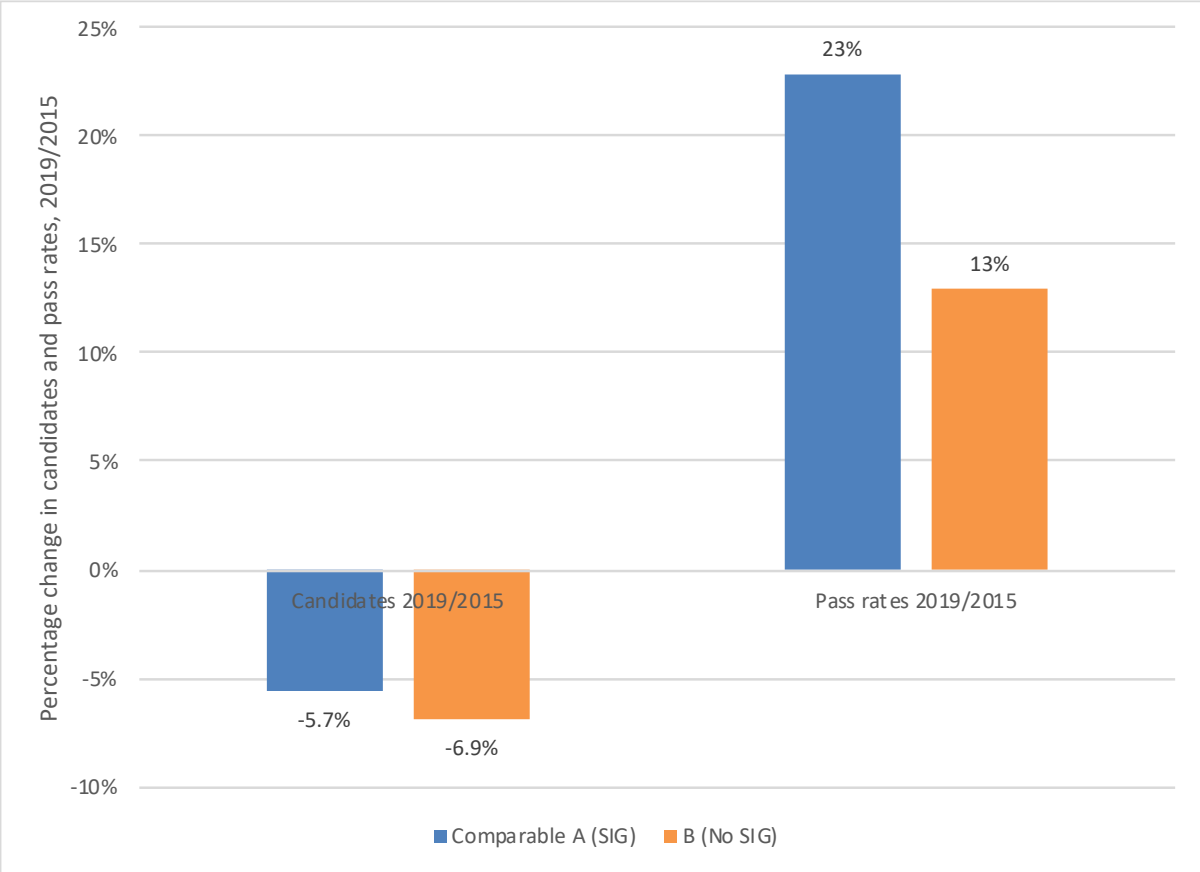
Figure 17 G7 Candidates & results for samples A and B, 2015 & 2019

Sample	2015 G7 candidates	2019 G7 candidates	2015 pass rate	2019 pass rate	Change in no. of candidates	Change in pass rate
Comp. A (SIG)	4564	4306	26%	32%	-5.7%	23%
B (No SIG)	6386	5945	31%	35%	-6.9%	13%
Grand Total	**10950**	**10251**	**29%**	**34%**	**-6.4%**	**17%**

Source: EMIS data, UNICEF data, Survey responses; Mokoro analysis.

84. Both samples experienced improvement in pass rate at G7 between 2015 and 2019. While in absolute terms, the pass rate of schools with SIGs still lag behind those without, the SIG recipient schools show a much greater improvement. This is illustrated in the figure below.

Figure 18 Percentage change in G7 candidates and pass rates for comparative samples, 2019/2015



Source: EMIS data, UNICEF data, Survey responses; Mokoro analysis.

85. As is the case nationally for P3 schools, the number of candidates in our sample have decreased, but the numbers passing and percentage passing have both increased. This analysis offers evidence that schools receiving SIGs have increased their pass rate relative to equivalent schools without SIG payments.

86. Considering a gender perspective on examination performance at G7, analysis of the national data revealed that across all Grant Classes, more girls than boys presented as candidates for the G7 exams, and they obtained on average higher pass rates in both 2015 and 2019. Moreover, the pass rate for girl increased more than for boys across Grant Classes.

Table 5 G7 F candidates and pass rates by gender, 2015 & 2019

Grant Class	F % G7 Candidates		Pass rates				Change		
	F 2015	F 2019	2015 F G7	2015 M G7	2019 F G7	2019 M G7	F % of candidates	F pass rate	M pass rate
P1	52%	52%	90%	84%	90%	84%	-0.7%	0.2%	0.1%
P2	51%	51%	74%	69%	76%	70%	-1.1%	2.5%	1.5%
P3	50%	51%	33%	29%	39%	33%	1.2%	18.1%	15.6%
Total	51%	51%	44%	39%	50%	44%	0.6%	12.4%	11.5%

Source: EMIS data; Mokoro analysis.

87. Considering P3 schools only, comparing those that received the grant in 2020 with those that did not, once again there were more female candidates than male candidates, and female pupils gained a higher pass rate than male pupils.

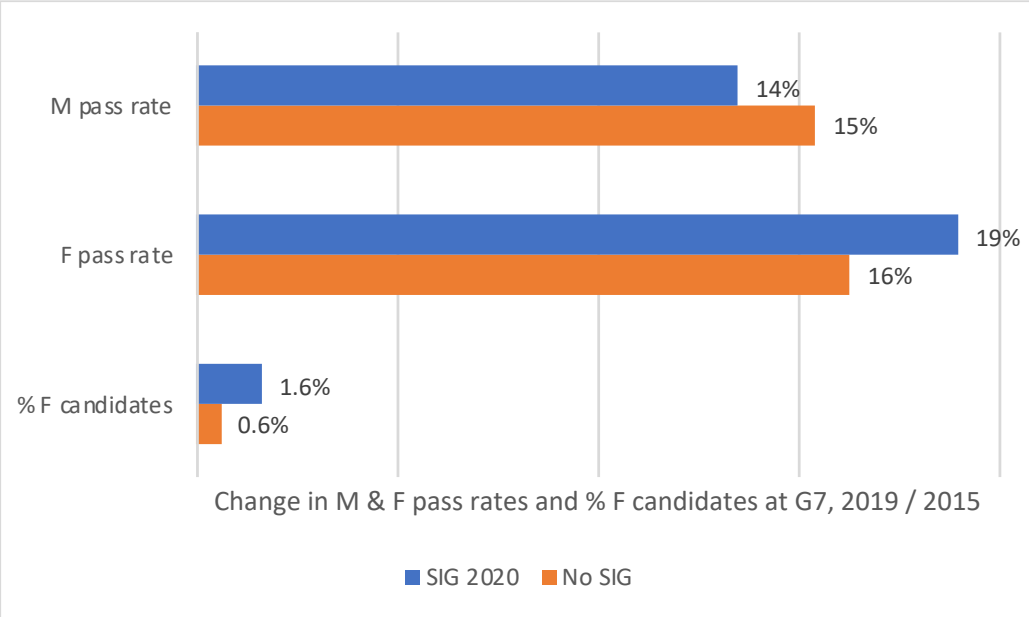
Table 6 P3 G7 candidates and pass rates by gender, 2015 & 2019

P3 only	F % G7 Candidates		Pass rates				Change		
	F 2015	F 2019	2015 F G7	2015 M G7	2019 F G7	2019 M G7	F % of candidates	F pass rate	M pass rate
No SIG	50.4%	50.7%	42%	37%	49%	42%	0.6%	16%	15%
SIG 2020	50.5%	51.3%	27%	22%	32%	25%	1.6%	19%	14%
Total	50.4%	51.0%	33%	29%	39%	33%	1.2%	18%	16%

Source: EMIS & UNICEF data; Mokoro analysis.

88. The table above indicates that the average pass rate, for all P3 schools, with and without SIG payments, improved from 2015 to 2019, and for both sets of schools, girls outperformed boys at G7, both in 2015 and in 2019. It worth noting that in schools receiving SIGs, the female pass rate improved more than in schools without SIG payments, and the percentage of female candidates also increased more. This is further illustrated in the graph below.

Figure 19 Change in National G7 pass rates by gender, P3 schools, 2019/2015

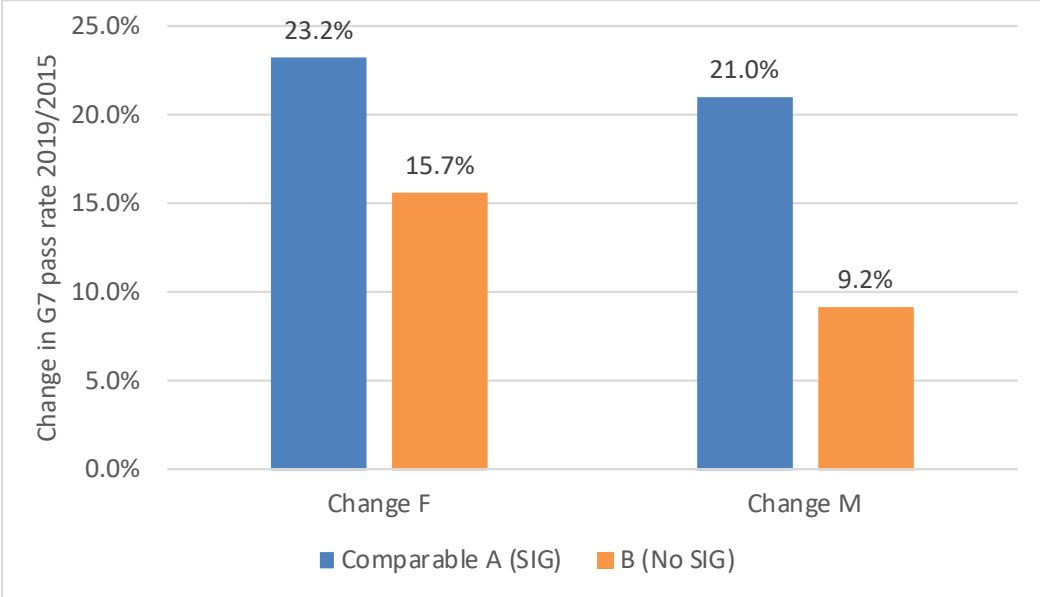


Source: EMIS & UNICEF data; Mokoro analysis.

89. Considering our samples of comparable schools, a similar pattern appears, with average pass rates improving across the board, and girls performing better than boys, both for schools with SIGs and those without. For both samples, girls, who already had a higher pass rate in 2015, have increased their pass rate more than boys. Furthermore, schools

receiving SIGs have increased their pass rates more than those without, and this holds true for both boys and girls.

Figure 20 Percentage change in G7 pass rate by gender for comparative samples, 2019/2015



Source: EMIS data, UNICEF data, Survey responses; Mokoro analysis.

90. To summarise, pass rates appear to have increased more for schools sampled with SIG payments in relation to comparative schools without the grant, though it is worth noting that the schools without the SIG still retain higher pass rates. In terms of gender, girls, who already had a higher pass rate in 2015, have increased more than boys overall. The pass rates of our sample of P3 schools with the grant shows improvement for both genders both in absolute terms as well as relative to the sample of schools without the grant.

Access and Enrolment

How effective are SIG payments in improving access to education for the poorest and the most vulnerable?

91. One of the major aims of the grant is to increase access to education for the poorest and most vulnerable. It does this through addressing the needs of resource constrained schools from the poorest communities (P3, satellite and special schools) in order to reduce the gap between these schools and other schools in Zimbabwe.

92. Many head teachers reported an improvement in enrolment that they attributed to the improvements in the school funded with the grant. However, analysis of the EMIS data indicates that primary enrolment increased across the board between 2015 and 2019 and increased more for higher income schools than for lower income schools. Given this, it is unsurprising that the picture shown by EMIS is of schools with SIGs experiencing less of an increase in enrolment than schools without the grant.

Table 7 Primary school enrolment and gender parity, 2015 & 2019

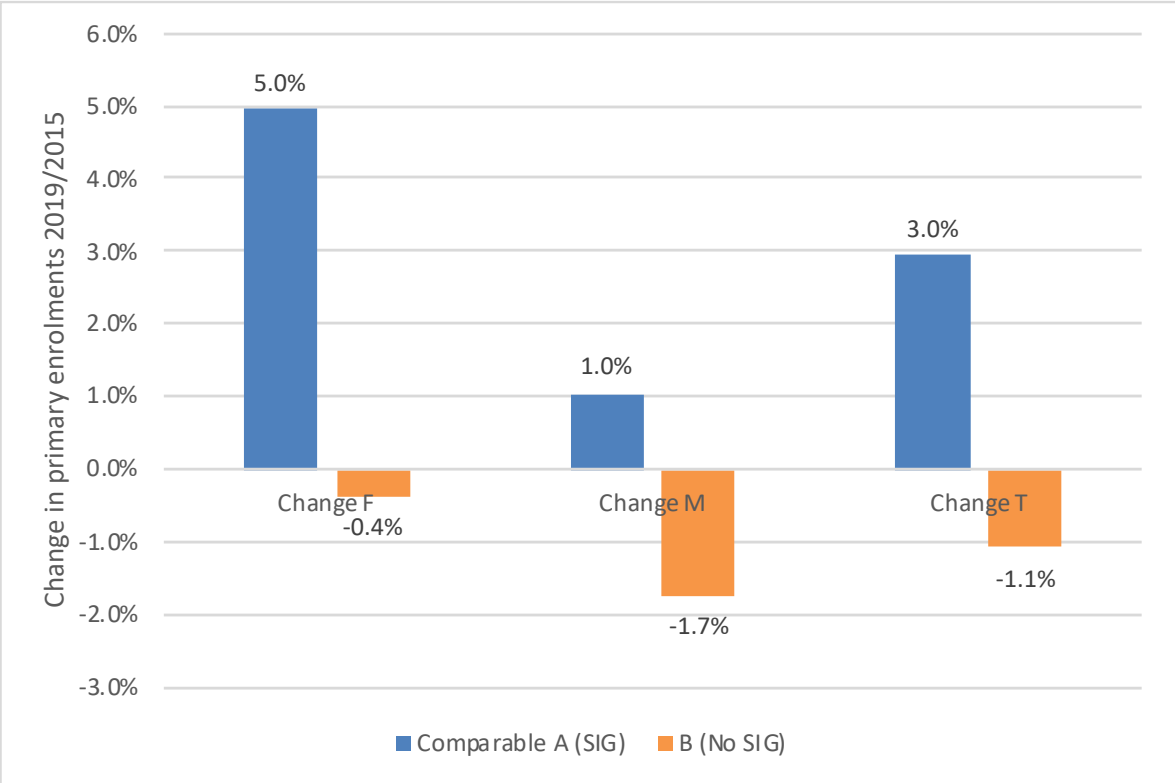
Grant Class	2015 school enrolment	2019 school enrolment	Increase in enrolment 2019/2015	GPI 2015 (F enrolments / M enrolments)	GPI 2019 (F enrolments / M enrolments)
P1	132,890	148,704	12%	1.05	1.06
P2	472,806	527,448	12%	1.00	1.00
P3	2,048,646	2,074,495	1.3%	0.97	0.99
P Total	**2,654,342**	**2,750,647**	**3.6%**	0.98	0.99

Source: EMIS data; Mokoro analysis.

93. Note, in terms of gender parity, this is close to being achieved in Zimbabwe, though there is a difference between the Grant Classes in this respect.

94. Analysis of our survey sample allowed a fairer comparison between schools with SIG payments and those without. This showed a rather different picture: SIG schools on average experienced increased enrolment of 3% whereas the schools without the grant had decreased enrolment of -1.1% over the same period. In addition, it is worth noting the gender difference. While national enrolment figures showed that more boys than girls enrolled in P3 primary schools, there is evidence that this gap has diminished over the five-year period. In our sample, it is clear that female enrolments have increased more than male enrolments, particularly in schools receiving SIGs, and while this may not be a direct result of SIGs, nevertheless, there is evidence that the grant may be helping achieve gender equity in terms of access to primary education.

Figure 21 Primary enrolments: change 2015 – 2019



Source: EMIS data, UNICEF data, Survey responses; Mokoro analysis.

95. For secondary school enrolment, the pattern was rather different. On a national level, once again there was increased enrolment, but it did not track school income and Grant Class as closely. A similar pattern with regards to gender parity can be observed, with girls outnumbering boys at the high income S1 and S2 schools, while boys outnumber girls at the lower income schools.

Figure 22 Secondary school enrolment, 2015 & 2019

Grant Class	2015 school enrolment	2019 school enrolment	Increase in enrolment 2019/2015	GPI 2015 (F enrolments / M enrolments)	GPI 2019 (F enrolments / M enrolments)
S1	93,225	97,961	5.1%	1.06	1.08
S2	220,284	239,613	8.8%	1.07	1.07
S3	705,477	745,878	5.7%	0.94	0.97
S Total	**1,018,986**	**1,083,452**	**6.3%**	0.98	1.00

Source: EMIS data; Mokoro analysis.

96. S3 secondary schools receiving the grant grew significantly more than those which did not, as well as increasing their gender parity.

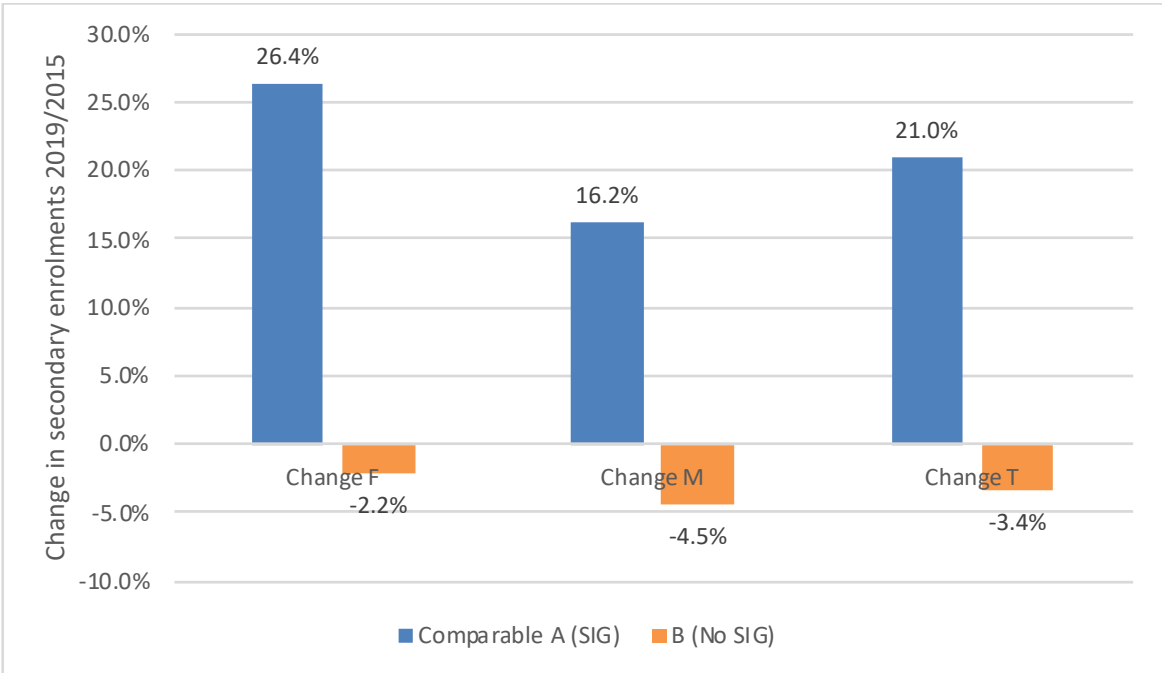
Figure 23 S3 secondary school enrolment with/without the SIG, 2015 & 2019

S3 only	2015 school enrolment	2019 school enrolment	Increase in enrolment 2019/2015	GPI 2015 (F enrolments / M enrolments)	GPI 2019 (F enrolments / M enrolments)	Change in GPI 2019/2015
No SIG	612,996	639,638	4.3%	0.94	0.97	3.4%
SIG	92,481	106,240	14.9%	0.92	0.97	5.4%
S Total	**705,477**	**745,878**	**5.7%**	0.94	0.97	3.7%

Source: EMIS data; Mokoro analysis.

97. This difference cannot automatically be attributed to SIG payments as there are a multiplicity of other factors involved, nevertheless, it is an interesting result. Analysis of our samples confirmed this picture. Once again, schools receiving the grant grew more than those without, and in this case there was an even more pronounced difference between the two groups.

Figure 24 Secondary enrolments: change 2015 – 2019



Source: EMIS data, UNICEF data, Survey responses; Mokoro analysis.

98. KIIs and FGDs confirm what our quantitative analysis, namely that improvements in the school environment has led to increased demand for enrolment places. Although respondents did note that this in turn has had unintended consequences: as one head teach noted this increased demand in provision of facilities and learning materials – new shortages begin to manifest as double sessions set in (case of one school enrolment shot up from about 300 to 597).

99. FGDs with the SDCs found that improvements in the school environment have led to schools becoming the 'go to places' for young learners. By supporting development and

improvements of satellite schools, SIG payments have brought schools within reach to enhance children's participation in education, hence improving access for these learners.

100. Access is a function of availability of schools but also what goes into enabling them to be centres for meaningful teaching and learning (classrooms, sanitation facilities, furniture, teaching and learning materials). Access is also about removal of barriers that prevent some learners from enjoying those benefits of such provisions.

- *To the extent that SIG has provided these, it has facilitated increased access*
- *To the extent that SIG provide fees support to OVC (at least initially), it removed economic access barrier*

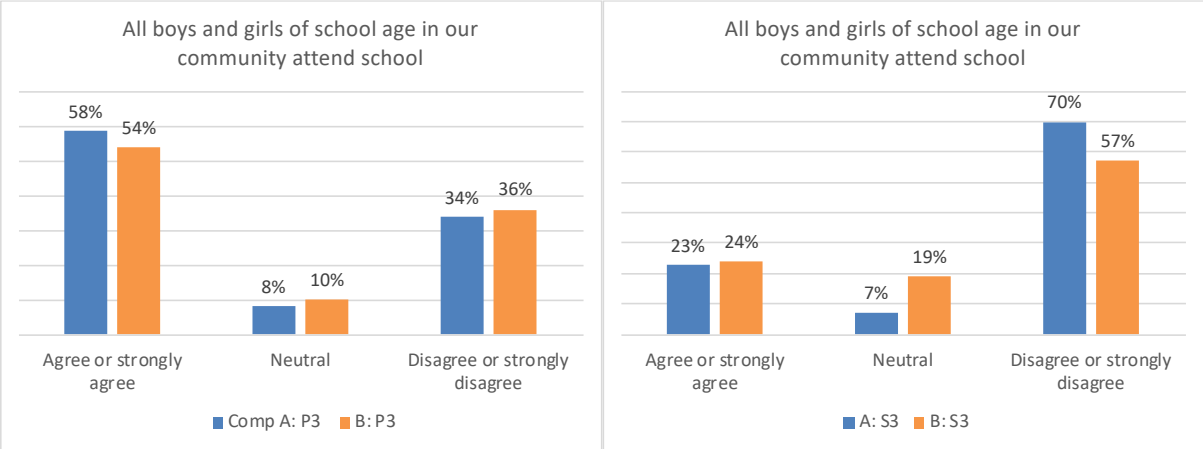
101. Informants were again of the unanimous view that not only has the SIG become the primary source of support for the marginalised schools but opened access to the marginalised groups that hitherto had been excluded for lack of means to support their education (OVC fees support).

102. Informants were also of the view that it is regrettable that school fees support for individual OVC children are no longer part of the eligibility criteria. The withdrawal of this support, in the perception of those interviewed and who participated in the FGDS, is that it has resulted in irregular attendance, keeping children away, and eventually leads to the dropping out of school by such children. Interviews with key stakeholders at MoPSE noted that a key reason for funding to OVCs being dropped was that it was the one criteria where the most ineligible expenditure was encountered and that support to OVCs is provided through other means such as the Basic Education Assistance Module (BEAM)[12].

103. Evidence from the survey of head teachers found that despite schools with SIGs reporting greater difficulty with parents paying fees and levies, primary schools which received SIGs were slightly more likely to say that all school age children attended school. For secondary schools, the situation was reversed. As the secondary schools receiving SIG payments were all satellite school, this is likely to be a reflection of the areas the schools were situated, as well as the multitude of other contextual reasons which influence enrolment in secondary schools (such as early child marriage, teenage pregnancy, livelihood pressures and so on).

[12] BEAM is a school fees assistance program, that was established in 2001 as part of the Government of Zimbabwe's policy to enhance social protection. The main objective of BEAM is to cover the fees of OVCs who could not afford schools fees. SIG verification reports found that BEAM contributed roughly 10% to school income.

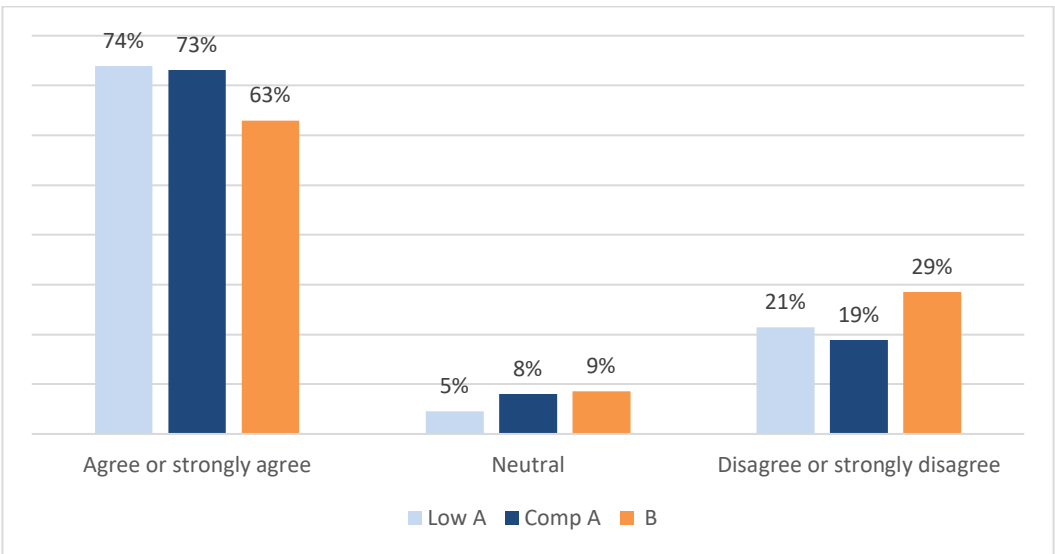
Figure 25 All boys and girls of school age in our community attend school, at P3 level vs. S3 level



Source: Survey responses; Mokoro analysis.

104. Survey findings also suggest that schools receiving SIG payments were more likely to report that the most vulnerable were able to access learning in their school than those schools not receiving the grant (33Figure 26).

Figure 26 The most vulnerable learners in our community are able to access this school



Source: Survey responses; Mokoro analysis.

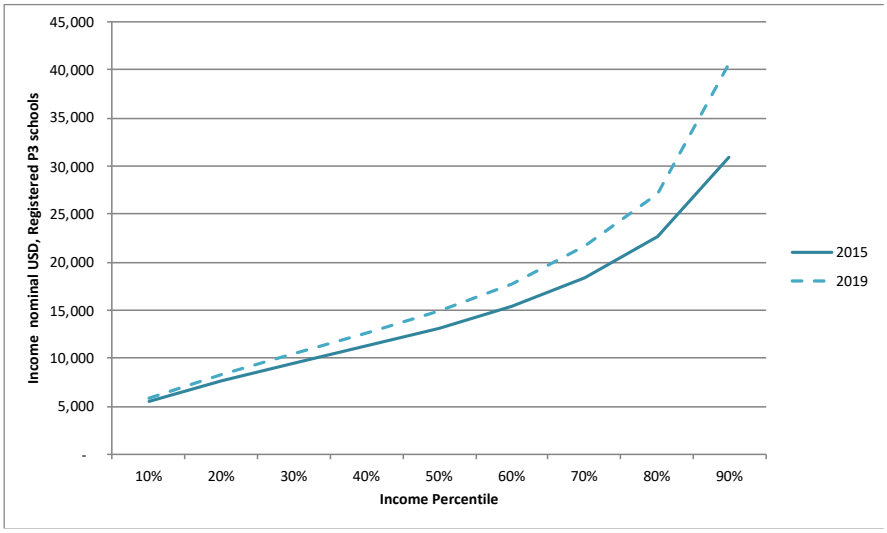
Level of funding

105. Over the lifetime of the SIG, the amount awarded per school has decreased for all types of schools, though 2020 saw a moderate uplift in the amount awarded (see table of the disbursement of the SIG above - Table 4). It is not surprising, therefore, that requests to return to increased levels of funding were voiced in FGDs and in the survey.

106. To analyse whether this was a reasonable request, we considered how school income has varied over this period. Looking at the national data for Registered P3 schools, which account for two-thirds of SIG recipient schools, it is clear that overall, while the top

10% of schools (90th percentile) enjoy a higher level of income in nominal terms, the bottom 10% of schools receive the same income in nominal terms. Thus the disparity in school incomes has increased since 2015.

Figure 27 Income distribution: Registered P3 schools, 2015 & 2019

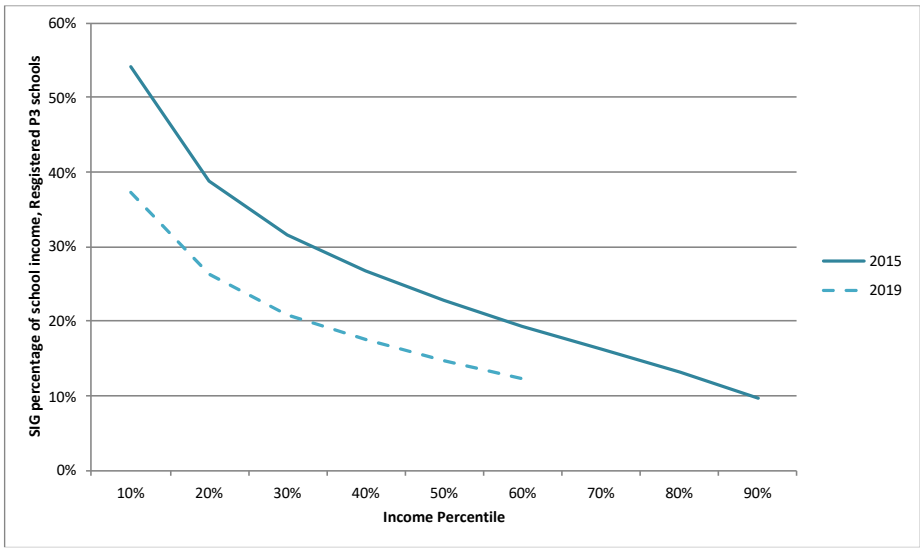


Source: EMIS data; Mokoro analysis.

107. Considering next the percentage of income contributed by SIG payments, the figure below illustrates how this has diminished since 2015 (the grant was 55% of the school income in 2015 for bottom 10% percentile schools, but only 38% in 2019[13]): for all schools it represents a lower percentage of their income, and the higher income P3 schools no longer receive it at all. This is primarily due to the size of the grant decreasing: as was shown above, the income of the bottom 10% schools has not increased over this time period at all.

[13] Whilst exploring this issue further is outside the remit of this study, KIIs suggest that this decrease (i.e. grant income dropping from 55% to 38% of total school income) may be because parental contributions have increased slightly over the same period.

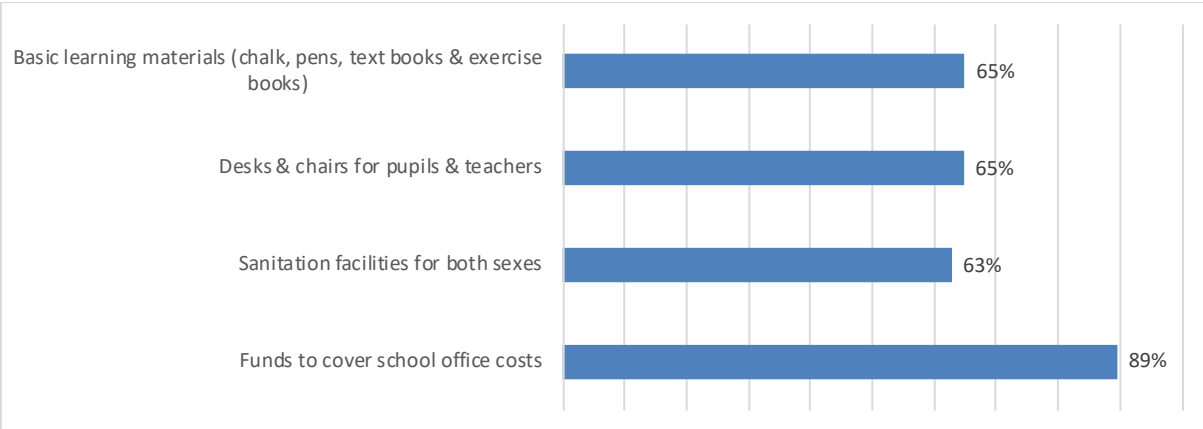
Figure 28 The SIG as a percentage of school income: Registered P3 schools, 2015 & 2019



Source: EMIS data; Mokoro analysis.

108. Returning to an area of the survey we have already considered earlier in comparative terms, analysis of a series of questions on the adequate provision of basic learning materials, school furniture, sanitation facilities and school office costs, we found that whilst schools receiving the grant appear to do better on these terms than the comparative B sample of low-income schools which did not receive the grant, it is clear that overall the SIG is not sufficient to meet these basic needs for most schools.

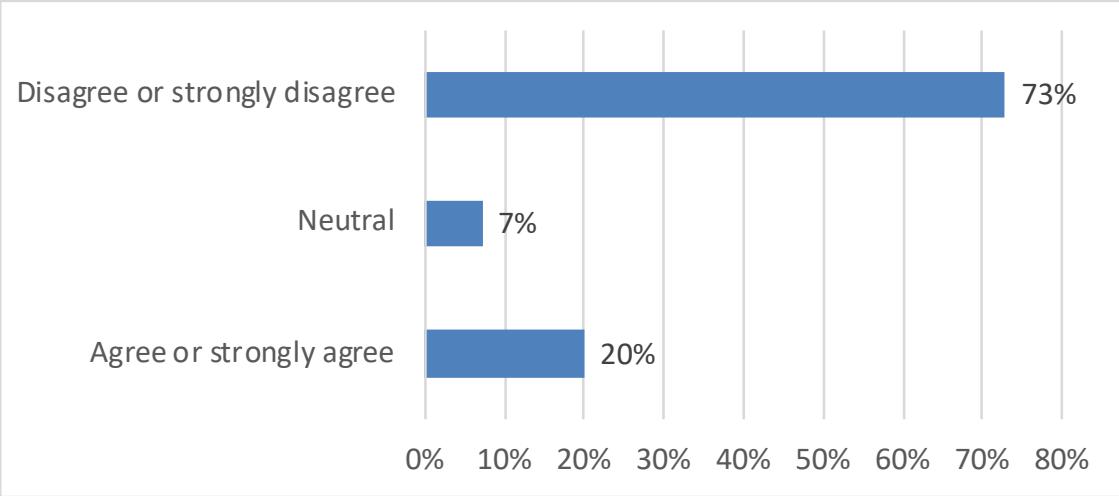
Figure 29 Areas where school does not have sufficient resources (SIG schools)



Source: Survey responses; Mokoro analysis.

109. This finding was echoed in a question on whether the grant is sufficient for the needs of the school. Only 20% of head teachers thought the SIG amount was sufficient for the needs of the school, as articulated in their school SDP, while 73% disagreed or strongly disagreed with that statement.

Figure 30 The SIG amount is sufficient for needs of my school as articulated in our School Development Plan

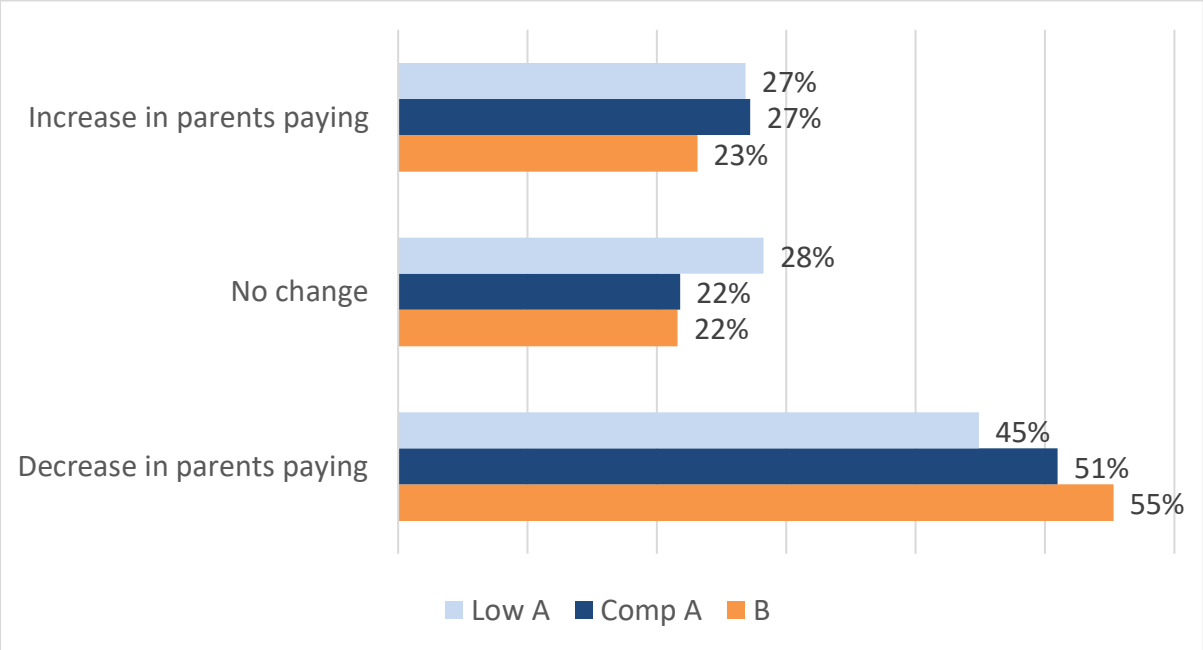


Source: Survey responses; Mokoro analysis.

110. However, this alone does not suggest that the amount of the grant should be increased at the expense of reducing the number of schools reached. As shown in Figure 10 above, equivalent schools which were not receiving the SIG were, by many measures, in a worse situation than those receiving the SIG.

111. School income is also influenced by the extent parents pay stipulated fees and the development levy. A commonly stated concern, in KIIs in particular, was that SIG payments caused parents to reduce their payments of the development levy. However, the survey offers evidence that the grant had no negative impact on parental contribution. Instead, the survey found the reduction in parental payments of levies is a general trend, although our survey does suggest that SIG recipient schools are more likely to pay when compared with our sample of non-SIG schools.

Figure 31 How has the percentage of parents paying the development levy changed over the last five years?

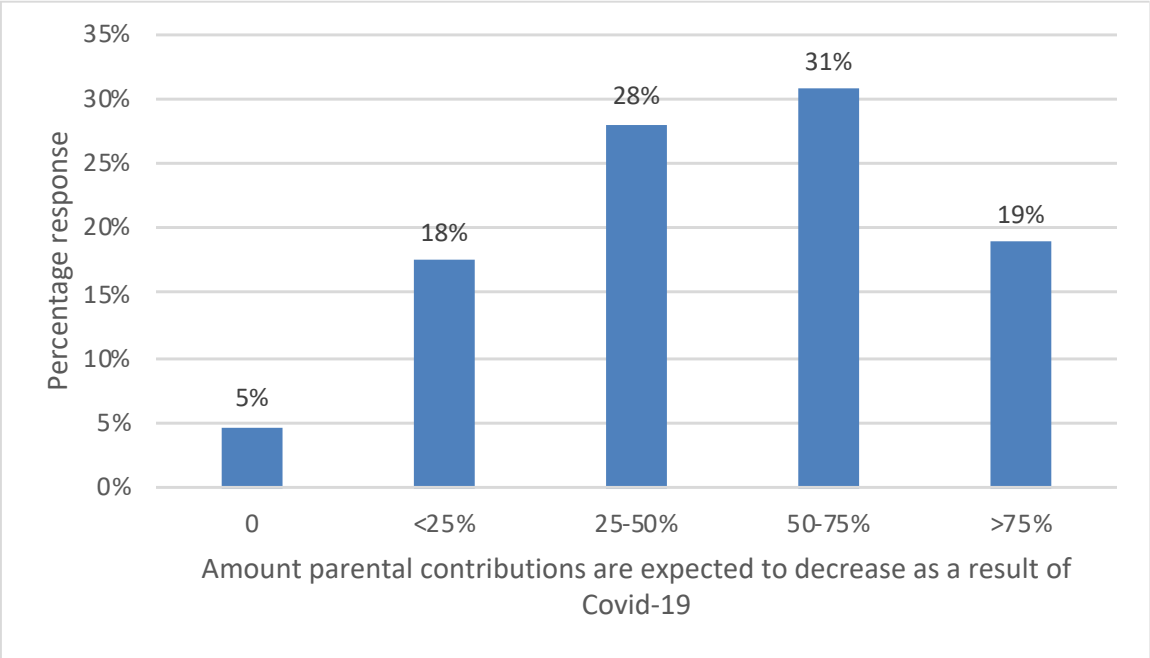


Source: Survey responses; Mokoro analysis.

112. This trend of decreasing parental payments is likely to continue, as the following illustrates, based on head teachers' responses to questions relating to the impact of Covid-19 on their communities. The survey found that 86% of schools surveyed felt unable to make and pay for adjustments to meet Covid-19 guidelines, and this was true equally for schools with and without the SIG, which all have a low income. 93% agreed that Covid-19 has made it difficult for many people to work, thus decreasing local people's income. 95% thought that parental contributions will decrease due to the economic impact of Covid-19, whilst half of head teachers surveyed thought that parental contributions would decrease by 50% or more[14].

[14] The most recent '*Zimbabwe: Situation Report'* (4 December 2020) prepared by the United Nations Office for the Coordination of Humanitarian Affairs reports that 'according to the 2020 rural ZimVAC assessment, households saw an average 51.5 percent reduction in income compared to 2019'. (https://reports.unocha.org/en/country/zimbabwe).

Figure 32 The immediate and medium-term impact of Covid-19



Source: Survey responses; Mokoro analysis.

Areas for Improvement

ISQ 3. How best can the SIG be improved?

113. In answering the question – how best can the SIG be improved - the impact study team present findings gleaned from informants regarding what can be learned from the implementation of the grant and also what they think are the measures that needs to put in place to ensure the grant continues to meet its objectives. We also look briefly at similar school grant programs elsewhere in order to explore to what extent the implementation of the grant can be considered good practice.

114. KII and FGD informants highlighted a number of common issues which they believe are affecting the efficacy of the SIG. These included, firstly, the issue **of timing**. Until 2020 funds were not arriving at the start of the school year, which made it very difficult for schools to plan for the year ahead, purchase learning materials at the outset of the year, and it also made it difficult for schools to complete projects within the year. For 2020, in a marked departure from previous years, the process for disbursement began in December 2019, which in practice meant the majority of schools received funds in either January or February. Factors influencing the earlier disbursement included conditions associated with the GPE variable tranche (i.e. a proportion of the tranche is dependent on SIGs being disbursed in the 1st quarter of the year) and a requirement by a key donor for its funds to be fully expended by the end of 2019.

115. Whilst outside the focus of this impact study, KII informants mentioned several reasons as to why funds had previously been disbursed to schools much later in the year, these included:

- **Delays in planning**: from the annual workplan, agreement by the EDF Steering Committee on the SIG utilization criteria, selection criteria and the allocations can take considerable time.
- **Late submissions of requests by schools**: As requests come from the schools via Districts then provinces and finally submitted to Head Office, a process which can be very time consuming.
- **Delays in capturing and creating pay sheets**: A process undertaken by the Grant management team but is often delayed due to short staffing. Capturing the data is done by interns and a slow recruitment process by these interns leads to delays.
- **Long disbursement procedure within UNICEF**: Due to all the checks and balances, it takes about 2 weeks for funds to be received by the schools once the disbursement process begins.
- **Shifting government policies**: In some years, delays have occurred as a result of new policies being introduced, such as when Zimbabwe moved from one currency to a multi-currency system, which led to schools having to open Nostro accounts which caused some delays.

116. Secondly, concerns were raised about how to ensure more **effective consultation**. A centralised arrangement works well for control. However, the grant requires a degree of devolution so as to involve the district offices for closer monitoring of implementation and quicken decision-making and support. More consultation with those closest to the point of delivery (district offices, school heads, SDCs) is necessary for joint ownership and commitment. In a project of the size and complexity of the SIG, relentless training and awareness creation, at every level, brings about shared understanding that broadens shared ground and narrows differences in project efforts. Schools have to work to restore confidence. It is possible to achieve a cohesive community (including parents and the School Development Committee), as long as the right consultations are undertaken.

117. Thirdly, informants raised the need to **enhance communication**, noting that there are good practices in some districts which others could learn from. This includes for instance, a process whereby the District has introduced a grant arrival alert to notify each school that the grant has arrived. This ensures that the funds do not sit in the school account and the school does not know. The Rapid Assessment Report (2020) found that of the 50 SIG recipient schools verified, only 6 schools encountered delays in communication, and that the communication had improved since previous years. The report notes, as already identified in this Impact Study, that the 'main consequence of delayed communication provided by schools was that it affected the schools' ability to obtain competitive prices due to rising prices and inflation experienced in 2019'.

118. Fourthly, the issue of the **currency fluctuations** was a major concern across all schools. Because funds were disbursed in US dollars but only usable in local currency meant that the school had to have two bank accounts (Nostro and local accounts). This presented immense hardships due to the following:

- refusal of suppliers to accept local currency, unless prices were inflated to cover their losses
- difficulties in sourcing (the grant not covering transport and subsistence) and finding quotations (suppliers reluctant to issues them given the fluctuations in prices)

119. The issue of currency fluctuations was also flagged by *SIG Verification Studies*, with several recent studies finding schools were reporting significant loss in the value of the grant due to exchange losses between official inter-bank exchange rates and unofficial market exchange rates. The *2020 Rapid Review* report noted that 86% (43) of the schools could not maintain the value of grant funds mainly due to external factors prevailing within the Zimbabwe economy. *The Rapid Review* also identified very similar issues to what this Impact Study found including:

- Suppliers requesting United States Dollars over the local currency and thus charging higher prices at unofficial market exchange rates at the time of sourcing quotations,
- Unavailability and (to the greater part of 2019 and early 2020) restrictions on the use of cash (US$) to transact left many schools with limited options but to source from suppliers charging higher prices, pegged at unofficial market exchange rates,
- Schools purchased less due to high prices,
- Quotations only valid for short periods (less than 24-48 hours), thus prices were constantly changing, and
- Suppliers requesting payments upfront, delaying the procurement process as school seek delivery prior to payment.

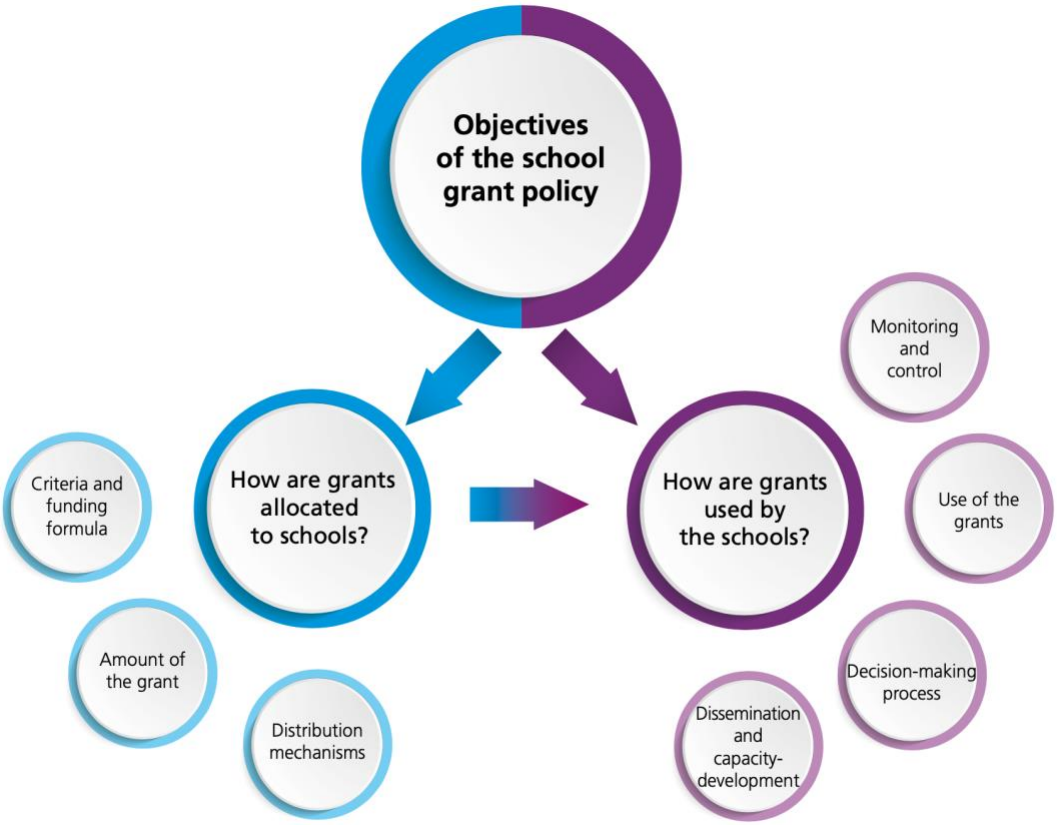
120. The Verification Studies have made important recommendations in this regard, suggesting that to mitigate against risk, the following measures should be introduced:

- Schools should aim to minimise the number of transactions involved during procurement, by consolidating purchasing activities to reduce number of payments required to utilise grant funds.
- Exemptions should be obtained from government to allow schools to transact in foreign currency, thus reducing the risk of foreign exchange losses.
- MoPSE should also consider allowing schools to transact using minimum cash US$, to allow schools to secure stable, lower prices from suppliers and maximise grant funds disbursed.

Good Practice

121. In order to help frame our analysis of the extent to which the implementation of the grant can be considered good practice or not, we have drawn on the UNESCO's analytical framework of the use and usefulness of school grants (Figure 33). The framework examines six dimensions of school grants, underpinned by the objectives of a school grant policy.

Figure 33 UNESCO's analytical framework for assessing school grants (Source: UNESCO, 2018)



122. In our assessment, the implementation of the SIG can primarily be considered good practice, and that the only major weakness relates to the extent that funding for SIG payments is wholly reliant on support from development partners (as identified in Table 8 below).

123. At the policy level, the overarching, long-term objective of the SIG, which align with MoPSE's policy objectives, is clearly spelt out in the initial design framework[15], namely 'to have in place a single consolidated comprehensive school grants programme providing adequate levels of funding for all non-salary resource needs' (2013:10). The design framework also clearly articulates the specific equity purpose of the SIG, again aligning to MoPSE's equity goals, namely:

> *To provide adequate and well-targeted levels of funding to financially constrained schools to cover non-personnel and non-capital resource demands in the school which will enable it to at least meet a minimum set of school functionality criteria'* (2013: 11)

124. As is noted in Table 8 below, in order to achieve this purpose the SIG has prioritised funding schools with the greatest level of resource needs through competent targeting and

[15] *School Improvement Grants Design Framework*, prepared by the Ministry of Education, Sport, Arts and Culture in partnership with the Education Transition Fund II, January 2013.

robust eligibility criteria. Moreover, Table 8 below illustrates how SIG can be seen to be following good practice, including in terms of how the grant is allocated (e.g. explicit eligibility criteria for selection and utilisation, transparent funding formula, and an efficient distribution process) and how the grant is used by schools (e.g. alignment with SDPs, the robust financial monitoring and control systems, the decision making process at school level, and appropriate training and guidance). The monitoring and control of the SIG provide an example of best practice in the region of how a programme has managed to institutionalise effective mitigation procedures on fraudulent funds recovery.

Table 8 Assessment of SIG, using UNESCO's School Grant Analytical Framework

Component		Good Practice[16]		Zimbabwe's SIG Program
Objectives of the School Grant Policy		• Clear policy, with explicit objectives about what the grant can realistically achieve	□	• Clear rationale and policy spelt out in design document • Clear link between MoPSE's equity policy objectives and SIG selection and eligibility criteria
How the grant is allocated	**Criteria and funding formula**	• Explicit criteria • Transparent funding formula (including explanation as to how budget feasibility aligns with policy objectives)	□	• Eligibility criteria are well defined and widely distributed • Funding formula available
	Amount of the grant	• Iterative process to determine amount linked to objectives, budgetary feasibility, and funding formula)	□	• Amount depends on estimate of available and forecast budgetary resources from development partners, rather than linked to needs of schools
	Distribution mechanism	• Efficient distribution process which ensures that funds arrive on time and without any losses	□	• Systematic distribution process ensures funds are directly transferred from the central level to special purpose account for each school • Payment schedule has become more reliable over the years, although process remains fairly lengthy
How the grant is used by schools	**Use of the grants**	• Documented link between expenditure and school development plans • Appropriate balance between expenditure that	□	• Rigorous process to develop and assure SDPs • SIG eligibility criteria ensure this

[16] Ideas drawn from UNESCO (2018) *Designing and Implementing a School Grant Policy: Technical Guide*. Paris, France: International Institute for Educational Planning, available at https://unesdoc.unesco.org/ark:/48223/pf0000265168 (accessed 8 June 2020)

Component		Good Practice[16]		Zimbabwe's SIG Program
		favours both teachers and learners • Funds meeting specific needs of disadvantaged groups in schools		• Evidence of SIG funds being used to address needs of disadvantaged groups in schools
	Monitoring and control	• Capacity building initiatives to ensure stakeholders have the necessary knowledge and capacity to identify the school's needs, and can effectively fulfil their grant and school management role[17]	□	• Significant efforts have been made to ensure relevant stakeholders at school level can fulfil their SIG financial management obligations • Robust financial accrual process • Independent verification studies have found almost no issues of financial malfeasance • Institutionalised effective mitigation procedures on fraudulent funds recovery
	Decision making process	• Decision making process shared between school leaders, parents and the community[18] • Parents and community members have sufficient capacity to make informed decisions to improve education quality	□	• Guided by SDP and SDC • Greater transparency required between SDC and schools
	Dissemination and capacity development	• Accessible and understandable information on the grant policy • Provision of appropriate training and guidance • Empowerment of the actors to make decisions	□	• Efforts have been made to raise awareness (e.g. SIG criteria distributed widely) but policy not distributed widely • Efforts have been made to develop capacity of actors involved in managing the funds • Regular involvement of DSI in supporting schools use and accrual of SIG

125. The only real major weakness for the SIG Program is its heavy reliance on development partners and what they are able to commit to, exacerbated by the fact that there are no new bilateral donors currently planning to support the education sector. At present funding for SIG payments is reliant on the amounts and timing of disbursements from the donors who support the grant. This creates two related issues. One, what schools receive (and how many schools qualify) is determined by what donors are able to provide rather than the needs of schools. Two, as a result of the unpredictability over the total

[17] *SIG Verification Studies* report that the number of head teachers trained on internal financial controls had increased noticeably from 77% of all head teachers in 2015 to 91% by 2018.

[18] *SIG Verification Studies* report that procurements approved by the school finance committee (which includes SDC representation) had improved from 74% in 2015 to 90% by 2018.

amount to be disbursed each year, there is concern each year within schools as to whether or not they will again qualify for a grant, which in turn makes it difficult for schools to adequately plan over the long-term how best to implement their School Development Plan.

5. Lessons Learned

126. The impact study team identified a number of lessons learned, which it extracted from the main findings of this study. The lessons learned are listed as follows:

- Whilst SIG payments are appreciated by targeted schools, the level of the grant is below previous levels and this is insufficient, especially for the most vulnerable P3 schools
- Whilst targeting works well in terms of identifying the schools with the greatest need, there are schools with similar needs but are missing out because they are on the wrong side of the threshold[19]
- Lump sum allocation, disbursed in January, ensures schools can use grant effectively in a timely manner.
- It remains advantageous to retain the fixed sum nature of the SIG payment, as it keeps the process simple and does not discriminate against the poorest schools.
- By targeting those aspects that closely link with school functionality (as defined within the SIG utilisation eligibility criteria), the grant is contributing to enable learning to take place, which illustrates that the assumptions behind the SIG are correct.
- The responsive nature and adaptability of the SIG over time is a key feature of how adjustments have helped to achieve the objectives of the SIG.
- Improving the school environment is helping to make schools more attractive, which in turn is contributing to more children accessing targeted schools
- Support to satellite schools has had a positive effect, but has led to unintended safeguarding consequences, which, although outside the remit of SIG payments, does point to the need more broadly for necessary policy development to support learners from satellite schools to access exams safely
- Utilisation eligibility criteria have proved useful in guiding schools to address functionality issues, and yet have been shown to be responsive when needed (e.g. helping schools purchase PPE to ensure they remained operational in accordance with regulations and support getting water to schools)
- It is essential to have the correct EMIS number associated with the schools right from the start otherwise it is not possible to use EMIS to do any detailed analysis of SIG data (on issues such as school income, enrolment, pass rates and so on).

[19] Either a Satellite school (Primary & Secondary) with average income (2016-2018) just above $20,000 or a registered Rural P3 school with average income (2016-2018) just above $15,000.

6. Discussion

127. Our assessment of the extent to which the grant is contributing positively to the education sector in Zimbabwe raises important implications going forward. Several issues have been identified including the fact that the grant falls significantly short of meeting the needs of schools. Moreover, as we noted in the findings section there is disquiet amongst head teachers that the grant no longer specifically supports OVC fees, nor does it support an important need for many schools, construction of classrooms, particularly Satellite schools.

128. Moreover, there are a number of issues which pose an evident threat to SIG payments which unless addressed are likely to hamper the usefulness of the grant in the future. Firstly, the extent to which develop partners will continue to support the SIG program is particularly important bearing in mind that a key funder (FCDO) is likely to face significant budget pressure as a result of the recent announcement by the British Government to decrease its total ODA commitment and there are no new bilateral donors currently planning to support the education sector.

129. A second threat is the issue some schools are facing converting the grant into local currency. We already noted how in certain instances currency conversion reduces the total amount of the grant, and also often delays expenditure by the school. A third threat, as a result of the pandemic, is that parental support to schools is likely to diminish further, which will place additional pressure on the SIG program to address even greater need at school level. Whilst in the longer term the reliance on parental contribution should decrease as government increases its support to schools as a result of the recent amendment to the Education Bill, there is some way to go before the Government of Zimbabwe is in a position to fully finance free basic education. By implication the importance of the grant will likely remain for the foreseeable future.

130. However, our findings also identified a number of key strengths of the grant including that the SIG is well managed, a robust financial management system is in place, and there is minimal fraud. Our analysis of impact found that SIG payments are targeting the right schools, and that the SIG is having an impact on school functionality, pass rates and enrolment. In addition, we also noted opportunities which we believe will enhance the management of SIG payments such as improving communication with schools about the arrival of the grant and involving the SDC more systematically in an oversight role at the school level. Whilst uncertainty remains about both the scope and the launch of the proposed Basic Education Fund, there remains an opportunity to continue to advocate for the initiation of the fund and for the fund to learn from the lessons learned implementing the grant since 2013.

7. Conclusions

131. Since the grant introduced in 2013 it has had remarkable success in terms of national coverage, targeting the most fragile schools, and has contributed to enhancing the learning environment for pupils at these schools. However, it has yet to realise its goals of providing 'adequate levels of funding for all non-salary resource needs'. In fact, our study shows, to some extent, that the grant amount per school has slightly diminished over the past few years, which could undermine the effect the grant is having on these schools.

132. SIG payments have been effective in helping schools in a variety of different ways, not only in helping ensure school functionality but also in ensuring parents play an active role in helping to determine the development priorities of schools through School Development Committees. The management of the SIG have also been very successful in minimising ineligible expenditure of funds provided to schools.

133. In terms of the impact of the grant, our study has found evidence that

- SIG payments have been successful in targeting schools where parents are less able to pay fees and levies;
- SIG payments are making a noticeable contribution to alleviating the situation of the financially constrained schools through stringent targeting criteria;
- SIG payments are seen to be covering the right things, and contributing to school functionality;
- The SIG helps boost enrolment at Primary and Secondary level;
- Female enrolment increases more at SIG recipient schools at Primary and Secondary level; and
- The Grade 7 pass rate has improved at schools receiving SIG payments.

134. The increasing fiscal crisis in Zimbabwe, currency fluctuations, and the uncertainties about ongoing support from development partners will put the grant under increasing strain. To what extent SIG payments can mitigate against this will need to be given careful thought during future programming discussions, not only in ensuring it continues to be managed effectively, but also to increasing its efforts to advocate and lobby for the immediate implementation of GRZ's Basic Education Fund

135. Overall, our impact study recognises the enormous value of SIGs. It did not find any major issues with the way in which the grant is being implemented, but it has identified a number of key areas which we believe the program needs to address going forward.

8. Recommendations

136. The following recommendations are based on our findings and are in response to the key findings and lessons learned identified in the previous section. They are pitched at the strategic level and are linked to future programming. Whilst these recommendations have been shared with the MoPSE and UNICEF, they have not necessarily been agreed with either MoPSE or UNICEF or the Education Coordination Group.

Rationale	Recommendation	Responsibility and timing
SIG payments undoubtedly provided well-targeted levels of funding to financially constrained schools. SIG payments are seen to have improved the physical	Revisit grant amount & targeting: • The grant amount should be raised as it is not sufficient to meet the basic needs of schools (learning materials, school	To be determined (TBD)

Rationale	Recommendation	Responsibility and timing
conditions of schools. The grant is also seen to be covering the right things, especially as it has a largely developmental rather than consumptive thrust. Nevertheless, the survey found that only 20% of head teachers though the grant amount was sufficient for the needs of their school.	furniture, sanitation facilities, and office costs), which triggers the question of whether the level of low funding should continue to all schools or if the criteria should be changed so that fewer schools receive more resources. That trade-off is one that the MOPSE and partners will need to grapple with going forward. • Follow up on schools of lower income who do not receive the SIG and consider their needs	
The fixed sum nature of the SIG payment is of greater benefit to small schools and may, on a minor level, be biased against bigger schools, but as smaller schools tend to be lower income in Zimbabwe this is not a major issue. Whilst it would be possible to adapt the funding formula any advantage thereof would need to be weighed against the advantages of retaining the simplicity of one fixed payment given under clear stipulations.	Funding formula: • It remains advantageous to retain the fixed sum nature of the SIG payment, as it keeps the process simple and does not undermine the grants strong equity focus.	
The contextual environment had a huge bearing on the value and functionality of the projects (hence need to continuously manage risk factors). Use of two currencies (one for disbursement and the other for utilisation) has several practical challenges and implications	Currency conversion issues: • Need to identify good practice with regards to resolving currency conversion issue and share with all SIG recipients	TBD
When SIG funds were delayed this created great uncertainty and schools struggled to spend	Disbursement predictability:	TBD

Rationale	Recommendation	Responsibility and timing
the full grant within the allocated time period	• Improve communications with schools so they are aware if they will receive the SIG and can plan accordingly • Provide the SIG on time in January so schools can to procure teaching and learning materials timeously	
SIG payments have contributed to supporting key projects in the broader realm of improvements in the teaching and learning environments, and falling within defined functionality standards – physical environment, teaching and learning materials, water and sanitation, furniture, to the extent that the grant could support The SIG eligibility criteria align strongly with school functionality issues, yet expenditure on infrastructure support remains ineligible despite schools arguing it remains an important need for many schools, particularly Satellite schools.	Eligibility criteria: • To address ongoing need, consideration should be given to drawing on lessons learned from distribution of Emergency/Complementary grants re infrastructure to guide the process more widely, and/or • Support MoPSE's efforts to advocate for more to be allocated from the fiscus into school infrastructure, to allow SIG payments to be used for other materials/supplies that allow the school to function effectively.	TBD
KII and FGDs informants raised concerns about SDCs not routinely being involved in decision making processes pertaining to grant expenditure at school level. Better consultation with those closed to the point of delivery (such as SDCs) is necessary to ensure joint ownership and commitment, which in turn will help to enhance a more cohesive school community.	School Development Committees: • Involving the SDC more systematically in an oversight role at the school level needs to be reinforced to schools receiving the grant. DIs should be tasked with consulting with SDCs regularly to monitor SDC involvement as per the SIG guidelines.	

Rationale	Recommendation	Responsibility and timing
The 2017 Evaluation of the SIG program noted that SIG payment data was incompatible with EMIS due to the fact that the unique EMIS number for each school is not recorded on payment records. To this day this issue has yet to be resolved. Our own analysis of payment information found numerous instances of duplicate payment records for schools, schools assigned with the incorrect EMIS data, and schools being incorrectly classified	Data: • Need to improve data systems to make audit more efficient and to better align with Government systems, in particular using EMIS number to identify schools receiving the SIG from payment records.	TBD

Annex 1 Terms of Reference

BACKGROUND & JUSTIFICATION

The School Improvement Grant (SIG) programme aims 'to provide financially constrained schools with enough resources to address their most basic needs and to meet a minimum set of school functionality criteria with the aim of improving the quality of teaching and learning at the school level and reducing user fee costs for vulnerable children' The School Improvement Grants (SIGs) are implemented by the Ministry of Primary and Secondary Education (MoPSE) with support from UNICEF and have been in place since 2013. The School Improvement Grants (SIG) are a component of the Education Transition fund (up to 2015) and then the Education Development fund (2016-2020). All funds from SIGs are contribution of the EDF partners: FCDO and the German Development Bank (KfW).

The expectation has been that this process will lead to a phased reduction in compulsory parental education costs, especially for the poor and vulnerable. In addition, by investing resources at the school level it is hoped that a 'whole school approach' will be strengthened encompassing issues related to teaching and learning and community involvement in the school. A 'whole school approach' entails that the community, school authorities and children will assess the key challenges and barriers to school effectiveness and develop a School Development Plan (SDP) to prioritise problem areas, set out solutions to the problems and strategies to realise those changes.

The SIGs are disbursed directly to a dedicated school bank account from a UNICEF account, and have been used to address issues of access, quality, governance and resourcing within the context of specific needs articulated in a school's SDP. This plan may include issues such as ensuring access to quality education to pupils coming from the most marginalised households and to those with special education needs. The plan may also focus on the improvement of quality of teaching in classrooms, materials provision (core and non-core teaching and learning materials), improvement of school facilities and effective school resource management.

Grants are disbursed to each selected school annually to fund different components of non-salary and non-personnel needs that are indicated within a School Development Plan. The amount of SIG, however has been changing based on available resources annually. The approved areas of usage have changed over time but have been broadly:

-Teaching and learning materials;
-Classroom furniture
-Special needs provision (improved access and security for children with disabilities)
-School running costs
-Water and Sanitation
-School infrastructure construction and rehabilitation (not in 2019)
-Income generating activities to support school

Spending of SIG is also based on the utilization criteria which stipulates eligible items and non-eligible items. Since inception, the utilization criteria is reviewed regularly taking into account the available funds, and the prevailing financial situation in the country to ensure that the best value for money on the expenditure of the SIG is made to benefit the most disadvantaged learners and schools. The utilization criteria basically establish the components of 'school functionality' on annual basis. Verification findings and monitoring reports are also used to inform the utilization criteria.

On a yearly basis, SIG is disbursed to a selected set of targeted schools as determined by the Education Development Fund Steering Committee (EDFSC). Availability of funding determines the number and categories of schools that benefit from the SIG programme.

Disbursements are done once a year to selected schools and UNICEF deposit directly into school bank accounts. From 2013-2019, approximately Eighty-five (85) million USD dollars have been spent on SIG, hence the need to conduct the study and establish whether the programme has produced the intended outcome and impact results. It will also draw some lessons for future programming.

Year and Number of schools Reached
-The programme was piloted in all 32 Special schools, 100 schools (P3, S3 and satellite schools) in Goromonzi District (2013)
-5,215 schools which comprised of all Special schools, satellite primary schools, and allP3 schools across the country (2014)
5,996 schools comprising of all Special schools, all P3, satellite primary and secondary schools in the 10 provinces. (2015).

-3,194 schools comprising of all Special schools, selected satellite schools (primary & secondary) and some P3 schools with an income threshold determined by the EDF Steering Committee. (2016)

-4,033 schools comprising of all Special schools, selected satellite schools (primary & secondary) and some P3 schools with an income threshold determined by the EDF Steering Committee. (2017)

-4,003 schools comprising of selected Special schools, satellite schools (primary & secondary) and some P3 schools with an income threshold determined by the EDF Steering Committee. (2018)

-The programme is targeting 4,526 schools comprising of selected Special schools, satellite schools (primary & secondary) and some P3 schools with an income threshold determined by the EDF Steering Committee. (2019)

The Ministry of Primary and Secondary Education (MoPSE), and the Government of Zimbabwe more broadly, have put in place procedures for the managing and accounting of. public resources. In order to ensure accountability and good governance of the SIG, every year independent entities (audit firms) are contracted to conduct an independent verification of 10 per cent of schools receiving SIG. The prime purpose of independent verification is to ensure that any departure from the financial management procedures and the misuse or misappropriation of funds by schools is rapidly identified and corrective action taken, up to and including disciplinary or legal action. The findings of the SIG verification exercise are used to inform future SIG programme including the utilization criteria.

Given the importance of the SIG programme and sizable investment in it, and with EDFII ending in December 2021, it is timely to conduct an impact study to determine the effectiveness of SIG and explore any impact the SIG have had on school efficiency, equity and effectiveness.

The study is to answer some key questions in order to determine the level and degree of the SIG's impact. Some key questions are listed under methodology. These Terms of References provide the framework for the impact study. It sets out, among other things, the objectives of the study, some of the questions to be answered, the criteria to be used, a proposed methodological approach, and outputs expected from the process.

OBJECTIVE OF THE STUDY

To establish the impact of the School Improvement Grant (SIG) in order to assist the Ministry of Primary and Secondary Education (MoPSE) to determine how best SIG can be improved and sustained as a mechanism for school financing, and to determine:

a.The effectiveness of SIGs to improve access to education for the poorest
b.Whether minimum school functionality, as defined through the SIG utilisation criteria, was reached
c.Identify benefits not anticipated in the original design
d.Identify the best ways SIGs can be improved and sustained as a mechanism for school financing.

SCOPE OF THE WORK

MoPSE will lead the study under CERID (Centre of Education, Research, Innovation and Development). A small MoPSE core technical team (CTT), led by the Permanent Secretary and supported by the Director of Finance, will be established to provide oversight and quality assurance inputs into the study. The institution will engage a lead adviser (LA) for the duration of the contract to work closely with CERID. In close consultation with the CTT, the LA will identify and manage additional TA as and when required for various components and build the capacity of MoPSE in the process.

The following key tasks need to be carried out by the Institution:
1.During the inception period:
a.Conduct a desk and literature review
b.Finalise the study questions (both quantitative and qualitative)
c.Finalise a detailed workplan

2.During the Implementation period:
a.Conduct the study through:
i.Data collection for both quantitative and qualitative questions
ii.Data cleaning and analysis
b.Prepare the draft report for review by key stakeholders (MOPSE, Donors, UNICEF)

3.Prepare the final report which incorporates comments from stakeholders for approval by the EDF Steering Committee (EDF SC)
4.Prepare a power point presentation of the key findings and recommendations and present this to EDF SC and the senior management of MoPSE in the Education Coordination Group (ECG).

Institutions and contractors interested in undertaking this work should submit a technical and a financial proposal to UNICEF Zimbabwe outlining the process, human resources and budget required to accomplish the deliverables outlined below under Expected Deliverables and Payment Terms.

METHODOLOGY

The Institution is expected to present, in detail, their approach, methodology and tools, with an action plan and time frame that addresses the expected outputs, with reference to the overall and specific objectives. Specifically, Institutions are expected to propose an appropriate methodology that will effectively achieve the stated objectives set out in Sections 2& 3, and answer the questions set out in Section 7 (Evaluation criteria and guiding questions). While UNICEF foresees a mixed methods study, it is expected that the proposed methodology includes both a strong quantitative and qualitative component.

Some methods are suggested below but Institutions are not restricted to these suggestions. Institutions are encouraged to propose the use of research methods that go

beyond the basic ideas set out below. It is critical that bid documents propose a robust methodology and related methods that clearly illustrate how programme effects will be measured, are explicitly aligned to the TOR and allow for clear understanding of the analytic strategies to be used.

Desk and Literature Review: A substantial amount of documentation on the SIG is available. Similarly, a lot has been written on education in Zimbabwe, the context and the challenges faced by the sector in recent times. The institution will carry out an analysis of literature and research to examine current situation, practices and lessons learned pulling largely from similar studies in the region.

Lessons learned and approaches used by other countries using the similar school financing modality will be beneficial.
Analysis of existing data: Data sets are available from previous SIG Verification reports. These can provide data for use in a range of quantitative analyses.
Surveys: The Institutions should identify and include plans on how beneficiaries and other stakeholders will participate in this study. Surveys should be designed and administered with appropriate attention to the respondents' profile (age, sex, literacy level etc). Surveys should be rigorously designed with appropriate sampling methods and expectation of acceptable response rates.

Interviews: Institutions should consider using structured and semi-structured interviews to get detailed inputs and perspectives from key informants and other stakeholders for the qualitative elements of the study. These will help to answer questions regarding process and deepen understanding of how and why things happened (or didn't).

Focus Group Discussions: These should be used to gain a deeper understanding of the experiences and opinions of diverse stakeholders and beneficiaries and help with triangulation.
Observations: These should be considered in order to ensure the institutions understand the issues they are studying as well as confirm or challenge other data and interpretation of data. The institution should design observation schedules and apply approaches that minimize disruption.

Design of the study
Based on consultation with various stakeholders, the following criteria have been identified as sample questions the study need to address to determine the impact of SIG. Institutions bidding for this consultancy are encouraged to suggest further refinement in their interpretation of the criteria and questions, which will be finalized during the inception period. See annex B

Data Analysis
Institutions should propose clear analytic strategies that set out specific methods/approaches suitable for analysis of the quantitative and qualitative data. The expectation is that the analyses will take advantage of the most current approaches to analyzing quantitative and qualitative data in order to show a linkages between the programme and claimed effects. This should include analysis of the EMIS, and other relevant existing data sets. Techniques should ensure sufficient attention to issues of equity including dimensions related to gender, geography and wealth. The study must strike a judicious balance between the qualitative and quantitative aspects, the overall thrust being to facilitate a deeper insight and appreciation of various aspects and impact of SIG on schools, on the one hand, and creating a sufficiently broad base for generalizations that can serve the purposes of sets and subsets of policies, plans and strategies. Decisions regarding choice of design should be adequately defended.

Stakeholder Participation
Institutions should design creative opportunities for contributing to, reflection on, and validation of, the study's findings by stakeholders including children. The Institutions will facilitate the sharing of findings and provide space for meaningful feedback which validates findings (data and interpretation).

Ethical Considerations
In developing its proposed methodology, Institutions should be mindful of the need to be governed by UNICEF Procedures on Ethical Standards in Research, Evaluation and Data Collection and Analysis, as well as national regulation on ethical research. These will guide design and implementation of the study. To ensure that the key ethical principles for the conduct of the study involving human subjects are followed, the selected bidder will be required to get clearance to conduct the study from a national ethical review board. The work plan should reflect this aspect of the process. Consideration should also be given to basic ethics in researching human subjects such as consent to participation, confidentiality, disclosure of the purpose of the study and potential advantages/disadvantages of participation, and how the collected information will be used.

The Institution shall not make use of any unpublished or confidential information, made available during executing this consultancy, without written authorization from UNICEF and/or MOPSE. The products of this consultancy are not the property of the Institution and cannot be shared without the permission of UNICEF.

EXPECTED DELIVERABLES

Works Schedule
The consultancy will start as soon as possible and while the duration is for three months it is anticipated that the duration may go up to 31 March 2020 where the work has to be completed. The payment to the institution will be made according to the following schedule and evidence of deliverables capacity building activities are sought throughout.
Deliverables, see annex C

REPORTING, MANAGEMENT AND SUPERVISION
The impact study is a three months' worth of work but spread within six months to accommodate any bottleneck that may arise, this should be looked at a six-month process. The study is for 3 months spread within 6 months. The institution will be directly supervised by UNICEF through the Chief of Education or her designee with support of The Research and Evaluation Group (TREG) with day to day supervision by CERID. The EDF Steering Committee (EDF SC) comprising representatives of MoPSE, UNICEF, FCDO, KFW and other education partners will serve as a technical review committee. The Committee will provide oversight to the process and be responsible for providing feedback on and approving all submissions by the Institution.

PAYMENT TERMS AND SCHEDULE OF DELIVERABLES
UNICEF reserves the right to withhold all or a portion of payment if performance is unsatisfactory, if outputs are incomplete, not delivered or for failure to meet deadlines. See Annex D

REQUIRED QUALIFICATIONS, BACKGROUND AND EXPERIENCE
Institutions must provide details of qualification, samples of reports on_ similar studies/evaluations, and a work profile of the team leader and other team members. The team should meet the following minimum criteria:

-At least 15 years' experience in education systems/policy, five of which should be in international developing country context;

-A team leader with at least a Master's Degree in education, the social sciences, or research and demonstrated expertise in programme evaluation;
-Strong track record in evaluating complex national level education programmes in developing countries;
-Proven experience in the use of participatory, qualitative and quantitative assessment and analytic methods;
-Proven technical competence in quantitative and qualitative data analysis;
-Knowledge of the Zimbabwean education system;
-Expertise in budgeting and budget analysis especially as it relates to assessing Value for Money;
-Fluency in English is required while team members fluent in Shona and Ndebele is desirable; and,
-Proven track record of producing excellent analytic reports.

Institutions should also include a Certificate of Incorporation or other appropriate documentation proving that they are a registered company or institution

Annex 2 Country context

Figure 34 Map of Zimbabwe

Source: United Nations (2017)

Political environment

1. Following the declaration of a national emergency in December 2008, a government of national unity was formed by ZANU-PF and its main political opponent, the Movement for Democratic Change. Elections in 2013 saw ZANU-PF achieve a majority in Parliament and take full control of the executive. In November 2017, President Mugabe ended 37 years of rule by resigning amidst a military takeover and impending impeachment hearings (Graham-Harrison & Burke, 2017). The former Vice-President, Emmerson Mnangagwa, was sworn into power and was re-elected to office in a general election held in July 2018, winning 50.8 percent of the vote (BBC, 2018).

Economic context

2. During the 1980s, Zimbabwe boasted a strong agrarian economy, but economic shocks in the early 2000s contributed to a severe decline in living standards as gross national income (GNI) per capita fell from 890 US dollars (USD) in 1990 to USD 330 in 2008 (World Bank, 2019). A crisis was reached in 2008, with one of the highest hyperinflation

rates ever recorded globally. Stabilisation measures, both politically with the formation of the coalition government and economically with the introduction of the US dollar as a means of exchange in 2009, led to a rebound in economic growth. Gross domestic product (GDP) grew by 16.6 percent in 2012, before slumping to 2 percent in 2013. It surged again in 2018, rising to 6.2 percent, but, this was short-lived, with recent humanitarian shocks (such as a drought and Cyclone Idai) and currency turmoil preventing sustainable long-term growth.

3. The real-time gross settlement (RTGS) dollar was adopted as Zimbabwe's new currency on 21 February 2019, bringing together bond notes, and debit card and mobile money payments. In June 2019 it was declared the only legal currency, so that the US dollars used in recent years, even if increasingly scarce, could no longer be used at all. The RTGS currency steadily lost value against the dollar, which led to inflation rates of 300 percent in August 2019 (Aljazeera, 2019), resulting in the reintroduction of denominations of the Zimbabwean dollar. The beginning of 2020 saw the return of the US dollar as acceptable tender in Zimbabwe, although it is expected to be phased out again in the coming years. The economic situation poses immediate operational challenges for UNICEF and other UN agencies. For example, cash transfer programmes are difficult to plan and execute in the context of a volatile economy where cash availability is difficult to predict.

4. In these weak economic conditions, the resourcing and capacity of Government of Zimbabwe ministries are constrained. Low salaries encourage high turnover in professional positions, creating new capacity-development challenges for UNICEF and other partners. Meanwhile, donor uncertainty about the government's fiscal management, which has led to noticeable arrears in terms of donor commitments, means that 60 percent of official development assistance to Zimbabwe comes through United Nations (UN) agencies.

Social indicators

5. Combined with declining living standards, the very high prevalence of HIV/AIDS reached in the 1990s and first half of the 2000s put a huge toll on human development. Approximately 1.3m adults live with HIV in Zimbabwe, as well as 84,000 children (USAID, 2019). Zimbabwe ranks 109th out of 119 countries on the 2019 Global Hunger Index, and the food security situation is categorised as 'serious' for the 65 percent of Zimbabweans living below the poverty line. Economic, political and environmental shocks have all contributed to reduced access to food in recent years. Low-productivity agricultural practices and lack of access to markets affect the vast majority of rural Zimbabweans, who depend on rain-fed crops for subsistence. A lack of diversity within diets in rural areas has contributed to high undernutrition rates, and while stunting among children under five has gone down from 32 percent in 2011 to 27 percent in 2015, it remains high.

6. Zimbabwe's 2018 Human Development Index value of 0.563 is above the average for countries in sub-Saharan Africa (0.541) (UNDP, 2019). This figure reflects a life expectancy at birth of 61.2 years in 2018, 10.5 years of expected schooling and GNI per capita of 2,661 PPP USD, also in 2018. The Human Development Report includes figures for the Gender Inequality Index, which measures gender-based inequalities in reproductive health, empowerment and economic activity. Zimbabwe ranks 126 out of 162 countries on this

index, with key data including 34.3 percent of parliamentary seats being held by women and 55.9 percent of women having reached at least a secondary level of education, compared with 66.3 percent of men.

Humanitarian challenges

7. In 2016, drought seriously affected rural communities: 67 percent of the population nationwide faced severe hunger, with only 50 percent of average grain yields realised. At its peak, it was estimated that 2.8m of the estimated total population of 16m were 'food-insecure' (DFID, 2016). The effects of the El Niño cycle extended drought conditions into 2016/17, contributing to a period of the poorest consumption since 2009. Widespread drought in 2019 leading into 2020 has contributed to an even greater hunger crisis (WFP, 2019). It was recently estimated that 51 percent of the population were in the 'stressed', 'crisis' or 'emergency' acute food insecurity phases (IPC & ZIMVAC: 3).

8. In March 2019, Cyclone Idai swept through Mozambique and into Zimbabwe. This was one of the worst tropical cyclones on record in southern Africa. Approximately 270,000 people were affected, with 181 deaths reported (OCHA, 2019). Among the seven districts affected, Chimanimani and Chipinge suffered the worst effects. The flash appeal issued by the United Nations in February 2019 was revised to request an additional USD 60m. Further increases in the number of food-insecure people were expected in the aftermath of this crisis. On 6 August 2019, the UN issued a revised humanitarian appeal indicating that 5.1m Zimbabweans were in need, that the appeal targeted 3.7m people, and that the new requirements for July 2019 to April 2020 would be USD 331m (UN, 2019).

9. In mid-2020, Zimbabwe thus faces a triple challenge of economic uncertainty and hardship (steadily worsening since September 2018), severe drought, and the effects of Cyclone Idai. In addition to all these humanitarian challenges, COVID-19 (early 2020) has exacerbated existing vulnerabilities. The lockdown, meant to control the spread of the pandemic, is having huge adverse effects on the economy and the provision of social services such as education.

Education sector

Background

10. Zimbabwe has a young population, with 41 percent under the age of 14 (6.6 million of a total 16 million) (World Bank, 2019). Its education system consists of four years of infant education (two years of early childhood development (ECD) education and two years of formal primary education). This is followed by five years of junior education, meaning a total of seven years are spent in primary school. At the end of their junior education, all students sit a national Grade 7 examination. Following this, students have a four-year lower secondary education programme (concluding with O-Level examinations) and then, for a smaller proportion, two years of upper secondary education (after which they sit A-Level examinations).

11. The participation of children in the education sphere has been characterised by ups and down, reflecting the effects of the environment in which education has been delivered. In 2008, the education sector was in a bad state, owing to the decline in the economic

performance of the country. The sector stabilised somewhat after the economic rebound that followed the political agreement in 2009, coupled with the introduction of the US dollar as the official currency. Recovery efforts were guided by a number of blueprints introduced after 2009, namely the Short Term Economic Recovery Programme (2009–2010), the Medium Term Plan (2011–2015) and, more recently, the Zimbabwe Agenda for Sustainable Socio-Economic Transformation (ZimAsset), a framework that looks to education to provide a workforce with competency in Information and Communication Technology (ICT) and Science, Technology, Engineering, Arts and Mathematics (STEAM). Even within the framework of these blueprints, the number of enrolled children, overall, consistently fell short of those eligible, except in the case of primary schools, where enrolment exceeded eligible population, owing to the presence of over-age children in the system. Table 9 shows enrolment against total population for each level and age group from 2016 to 2018. In early 2019 the situation had worsened, with reports saying that 17 percent of children between 4 and 17 years were not attending school, largely on account of being turned away for non-payment of fees (Zimbabwe Vulnerability Assessment Committee report, June 2019).

Table 9 School-age population statistics, 2016–2018

		2016		2017		2018	
Level	Age group (years)	Total population	Enrolled population	Total population	Enrolled population	Total population	Enrolled population
Pre-school /pre-primary	4–5	750,166	580,365	750,375	623,981	757,879	628,826
Primary (P1–P7)	6–12	2,533,101	2,662,010	2,534,679	2,676,485	2,560,026	2,725,970
Secondary (S1–S6)	13–18	1,892,981	1,064,804	1,894,371	1,075,325	1,913,314	1,093,550
Total		5,176,248	4,307,179	5,179,425	4,375,791	5,231,219	4,448,346

Source: Zimstat and MoPSE database (2016–2018)

Governance

12. Education governance is divided between MoPSE, with responsibility for ECD, primary and secondary education, and the Ministry of Higher and Tertiary Education, Science and Technology Development, with responsibility for tertiary education. Currently, governance by MoPSE is carried out centrally, with some degree of decentralisation to provinces and districts. At the school level, some autonomy is in the hands of the headteacher, with support from the School Development Committee (SDC). Planning is done at the central, provincial, district and school levels. Most of the school funding comes from fees administered at the school level, while policy and curriculum are directed from the central government level. Teacher employment and salaries are covered by the Public Service Commission. Although policy and school registration are centrally located, school ownership is spread across a number of state and non-state actors. Rural district councils are the responsible authority for most schools, followed by the government and churches/missions.

13. On the legislative and policy front, Zimbabwe has made headway in efforts to create opportunities for the enjoyment of the right to education through policy and legislation.

Following the ratification of global and regional treaties (United Nations Convention on the Rights of the Child, and the African Charter on the Rights of the Welfare of the Child), efforts to domesticate these in local legislation have been persistent. This has resulted in a clear commitment to the right to education in the Constitution (Amendment Number 20 of 2013), the Education Act and other Acts, as well as various statutory policy instruments. Table 10 shows selected legislative and policy milestones that were designed to promote access, equity and quality in education, from 2013.

Table 10 Selected education legislative and policy milestones, 2013–2020

Policy	Year	Purpose and key highlights
Constitution of Zimbabwe Number 20 of 2013	2013	Emphasis on values of non-discrimination, respect and human rights; domesticates the right to education
National Action Plan for Orphans and Vulnerable Children, Phase II	2011–2015	To ensure that orphans, vulnerable children and their families, in Zimbabwe, have incomes and access to basic services, and that all children are protected from abuse and exploitation
National Non-Formal Education Policy	2015	To help cushion all those who are marginalised, especially orphans, out-of-school children, and those with challenges in accessing formal education systems due to a variety of factors, including poverty and long distances to school
Education Sector Strategic Plan	2016	To provide for clarity of goals for the education sector, and describe the processes for regular monitoring of progress
The National Gender Policy	2017	To respond to the call for gender justice, equality, integration and inclusiveness, and for shared responsibility for sustainable development in Zimbabwe'
Education Amendment Bill	2018	To improve the education system and the rights of learners in Zimbabwe
Inclusive Education Policy	2019	To enhance the civil liberties of students with disabilities and their families
Early Learning Policy	2019	Provision of care and early education opportunities for children eligible for the Infant Module, namely ECD A, ECD B and Grades 1 and 2,
The Education Amendment Act, 2019 (Act 15-2019	2020	An amendment to the Education Act to ensure every child is entitled to compulsory basic state funded education

14. The Education Amendment Act, 2019 (Act 15-2019) was gazetted on 6 March 2020. Its main provisions include the outlawing of corporal punishment; the provision of sanitary wear to girls; and the Right to Compulsory Basic State-Funded Education, which makes failure to send a child to school an offence. Other significant provisions in support of the right to education include provision for non-formal education, which every school must strive to offer, including adult education; and provision for inclusive education, especially for children with disabilities. The sector has also seen the development of more progressive policies, which include the Inclusive Education Policy (funded by the Global Partnership for Education – GPE) and the Early Learning Policy (funded by EDF). These await final validation. A policy option paper on School Financing to support free basic education has been produced; however, it has not yet been approved.

School classification and funding

15. Schools in Zimbabwe can be classified in three ways: by ownership, by registration status and by location-based capitation grant. Registered schools are those that satisfy the

minimum criteria necessary for registration with MoPSE. Their learners are recognised as part of the enrolled student population in the Education Management Information System (EMIS) (regardless of whether the schools are publicly or privately owned or governed). Meanwhile, satellite schools are those that have not yet reached the standards necessary for registration but are considered to be on track. These are allowed to register under the guidance of a nearby registered school. Schools located in low-density urban areas are classified as P1/S1 schools, those in high-density urban areas as P2/S2 schools and those in rural areas as P3/S3 schools. This designation has a bearing on the amount of public funding schools receive. Traditionally, P1/S1 schools have received the least whereas P3 schools have received the most; however, since 2011, school grants have been given only to P3/S3 schools. These received, on average, USD 1,129 and USD 917, respectively, in 2014.

16. Government funding for education increased in absolute terms from USD 796m to USD 1,132m between 2014 and 2019, but in 2020 the budget decreased significantly. The 2020 education budget represents 13 percent of the total national budget, or 3 percent of GDP. Most of it goes to teachers' salaries and other recurrent costs, with less than 1 percent of expenditure going to capital projects in 2018. GPE data shows that for 2020, MoPSE is to be allocated 8.53 billion Zimbabwean dollars (ZWL) (USD 397m), compared to the equivalent of USD 803m in 2017.

17. Education Sector Analysis 2015 reported that the amount of money schools raised privately (USD 779 million) was almost equal to the budgetary provision from MoPSE (USD 837 million) (40Kageler, 2015). However, the inability of families to pay fees is cited as a major barrier to enrolment and completion for students, and a major driver of educational inequality, because schools with low fees or high non-payment of fees have much smaller working budgets than schools that can charge higher fees. Government policy is not to exclude any students for non-payment of fees.

18. Significant inequalities exist in the amount of funding available for schools, both between government and non-government schools and between urban and rural schools. In 2014, on average government P1 schools received USD 278,678 in public and private funding, while their P3 equivalents received USD 4,373. Parents are a significant source of funding for schools, with fees for primary day schools ranging from USD 44 per student in rural areas to USD 700 in urban areas. Even with lower fees in rural areas, the 2015 Education Sector Analysis notes that payment rates are low (below 50 percent in some cases), leading to significant funding problems for schools (as an average of 96 percent of school income across all categories of schools comes from fees).

Current context

19. The education sector of late has not escaped the major shocks that have beset the country. Examples cited in the most recent GPE report include the following:

- Teacher salaries have depreciated drastically, leaving teachers unable to support themselves and their families. According to the survey conducted by the Education Cluster, teachers are demotivated generally. The survey also found that teacher commitment was characterised by behaviour that included

absenteeism and coming to school late and leaving early, ostensibly to do private tutoring and side-business to supplement their salaries. It also found that teachers were reportedly eating fewer meals per day. Unsurprisingly, teachers have continued to petition the government over pay rises and improvements to working conditions and have occasionally threatened to withdraw their labour.

- At the household level, in some communities, inability to pay the school fees and levies has resulted in children being pulled out of school. The grain ration stopped for a while, which disrupted school feeding. While grain is now being distributed to schools again, the beneficiaries have tended to be only the youngest children and not all the children, and feeding is not done regularly.
- The education system in Zimbabwe was already stretched. With more than one humanitarian crises, estimates were that at least 1.2 million (35 percent) of children of school-going age, would need emergency and specialised education services in 2020. With the onset of the COVID-19 pandemic and the subsequent school closures, there has been disruption to the education of more than 4.6 million children, with adverse impacts on their protection and well-being, as well as their readiness for school, their attendance and their participation in learning. The combined effects of the humanitarian crises and the COVID-19 pandemic are expected to have far-reaching implications for the demand for and supply of education services.

Annex 3 Methodology

1. This is a theory-based, mixed-methods impact study, adopting an approach appropriate to the stage reached by SIG since it was piloted in 2013 and rolled out nationally in 2014, and the nature of the data available for review. The study combined secondary data from documentary, baseline and monitoring sources with primary data obtained through a random sample of schools, interviews, and focus group discussions (FGDs).

Qualitative Approach

2. In terms of the **qualitative component**, the study employed a comprehensive consultative approach, consulting a wide range of stakeholders – within the timeframe – and ensuring that the views of all key stakeholders were considered, reflected and triangulated. This was done with full attention to cross-cutting issues, such as gender, equity and human rights.

Sampling for the qualitative component

3. In the main, the qualitative component employed a purposive sampling strategy and sought to have in-depth discussions and conversations rather than cover as many stakeholders as possible.

4. A detailed stakeholder analysis, undertaken as part of the study process, allowed the study team to conduct **semi-structured interviews** with a mix of UNICEF officials, MoPSE officials, development partners as well as other relevant stakeholders. Due to restrictions imposed by Covid-19 induced lockdown, it was not possible to interface with MoPSE officials other than those at central level.

5. The questionnaire used to conduct the interviews can be found in Annex 4.

Focus group discussions

6. The study team conducted **focus group discussions** (FGDs) with SDCs, the purpose of which was to tease out the detail of the major findings from the surveys and to establish feasible explanations for key themes that emerge from them. A typical focus group lasted between one and one and a half hours. There were variations in the number of participants depending on availability and also in compliance with COVID-19 restrictions. Whereas the plan was to keep the group as homogeneous as possible in order to encourage participants to be frank and participative, reality on the ground was determined by who was able to respond to the invitation for the discussions.

7. A total of 10 recipient schools were targeted: ranging from the small (enrolment 68) to those classified as large (total enrolment 597) (Table 11). In order to obtain as broad a perspective as possible, the sample included special schools, P3 and satellite schools (S3 and P3). The gender distribution of each of the SDCs is shown in Table 12**Error! Reference source not found.**.

Table 11 Basic information on the schools where FGDs were held with their respective SDCs (Source: EMIS data)

Name of school	School Type	Province	Enrolment	Teachers
1. Oldbury Primary	P3	Mashonaland Central	220	13
2. Calgary Primary	P3	Mashonaland Central	256	7
3. Danhiko Secondary	Special (S)	Harare	519	22
4. Emerald Hill School of the Deaf (P + S)	Special [P] Special [S]	Harare Harare	343 138	26 21
5. Gilstone Secondary	S3/Satellite	Mashonaland East	300	9
6. Bromley Primary	P3	Mashonaland East	366	10
7. Belmont Primary	P3/Satellite	Mashonaland East	420	11
8. Pfupi Primary	P3/Satellite	Mashonaland West	452	10
9. Ditshwe Primary	P3	Mashonaland West	597	7
10 Beaula Primary	P3/Satellite	Mashonaland East	68	3

Table 12 Membership of the respective SDCs, by gender (Source: own observation)

Name of school	FGD Participants		
	Male	Female	Total
1. Oldbury Primary	2	4	6
2. Calgary Primary	3	0	3
3. Danhiko Secondary	3	3	6
4. Emerald Hill School	3	4	7
5. Gilstone Secondary	1	4	5
6. Bromley Primary	3	5	8
7. Belmont Primary	3	4	7
8. Pfupi Primary	4	4	8
9. Ditshwe Primary	7	1	8
Beaula Primary	5	0	5
TOTAL	34	25	63

8. Each focus group discussion followed specific guidelines, which were developed following preliminary analysis on the completed surveys. The guides were shared with MoPSE and UNICEF in advance.

9. Notes were recorded in standard Mokoro interview templates and compiled in a confidential compendium of interview or focus group discussion notes that care possible to share among the study team and searched by theme.

Qualitative analysis

10. For the analysis of the qualitative data, the study team used a contribution analysis approach. Contribution analysis sets out to verify the Theory of Change behind a programme and, at the same time, takes into consideration other influencing factors. Causality is inferred from the extent to which the activities of SIG were implemented and the chain of expected results outlined in the Theory of Change occurred. In addition, other factors influencing SIG

are assessed according to whether or not they made a significant contribution. If they did, this would influence the magnitude of the contribution made by SIG. The SIG study team sought both triangulation and complementarity between methods as well as triangulation within methods where appropriate (such as by comparing the perspectives of interviewed stakeholders with other data sources).

Box 1 Definition of triangulation and complementarity

Methods can be combined in different ways:

Triangulation: confirming and corroborating results reached by one method with other results reached by another method. For instance, when the beneficiaries of a project's service state that they judge it good (or bad), this can be cross-checked by collecting quantitative data on the coverage and accessibility of the service.

Complementarity: results obtained by one method help bring a better understanding of those obtained by another. In-depth, theory-based approaches may help researchers to understand reasons why a project led to unexpected results; qualitative methods may help clarify concepts and define variables; and large-scale data sets may be analysed by multivariate and case-based methods.

Quantitative Approach

Sampling methodology for the survey

11. Analysis of EMIS, which contains income data, enrolment and exam performance for all schools in Zimbabwe, was combined with a survey that sampled 900 schools across all rural provinces in Zimbabwe.

12. In order to correctly target the sample, the population of schools that received EMIS was analysed. Over the five year period considered, 2015-2019, there were a total of 9755 schools. Once the data had been cleaned and duplicates removed, the number of schools with data for all 5 years was found to be 8558.

13. Of these schools, the number which received standard SIG funds any time in the 6 year period from 2015 – 2020 was 6136; in other words, over 70% of schools in Zimbabwe had received SIG at least once.

14. P3 schools accounted for 85% of the schools that had received SIG over this period, S3 for around 14%, with the remainder, less than 1%, being other schools, particularly special schools. 98% of beneficiary schools were in rural areas.

15. Given this, it was decided to concentrate our survey on P3s and S3s only, since these grant classes make up around 99% of the schools benefitting from SIG. The other schools, in particular, special schools, were to be investigated separately in the FGDs, as they had very different needs and profiles to the vast majority of schools benefitting from SIG.

16. As the aim of the survey was to identify the impact of the SIG, the team decided to sample both schools that received SIG and those that did not in order to draw a comparison. Since SIG is a targeted grant, it was impossible to draw a control group that was exactly the

same. Instead, the control group of schools not receiving SIG was selected to be as similar as possible to a sub-section of the sample receiving SIG.

17. A multi-level stratified sampling process was applied. Two samples, A and B, were chosen, sample A consisted of schools that received the grant 5 or 6 times, while sample B, the control group, were schools that received the no more than once since 2015. It was decided that the majority of the schools would be in sample A to investigate SIG's effect as fully as possible, but that B would form a comparable group to a sub-sample of A.

18. Within the two samples, further subgroups were defined.

19. Firstly, there were the low-income P3s. Since these account for the majority of schools receiving SIG, they also accounted for the majority of sample A: 500 schools in the sample. Low-income schools were defined as schools whose median income over 2015-2019 was in the bottom 40th percentile of income for P3 schools. There was no comparison to this sub group in sample B since all P3 schools with a low income received SIG.

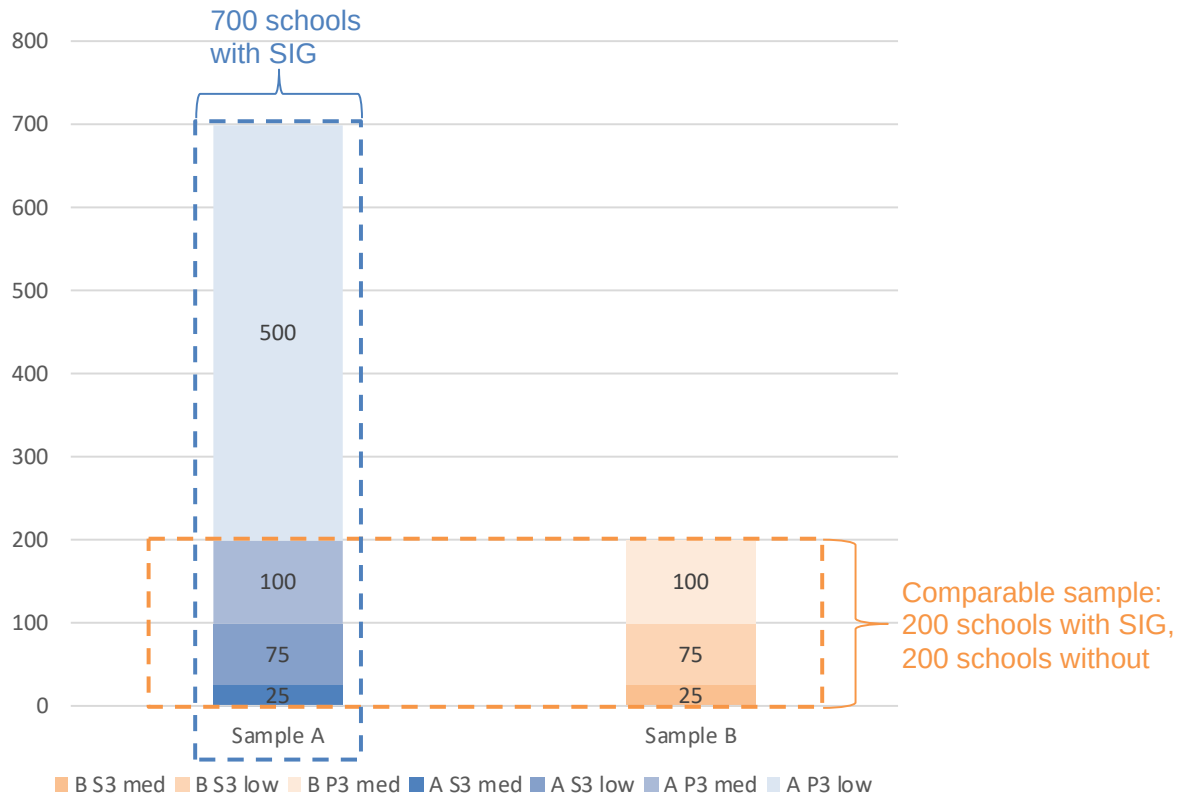
20. Secondly, there were median-income P3 schools, which were schools whose median income was near the median for P3 schools, i.e. around the 50th percentile. For this subgroup, it was possible to identify schools which had received SIG and those which had not received it more than once (all P3 schools had received SIG in 2015). Thus, a sample was obtained for both A and B, for the purposes of comparison.

21. Thirdly, there were the secondary schools, S3s. They accounted for slightly less than 15% of schools. For sample A, 100 S3s were sampled: 75 low income and 25 median income. This meant that overall, sample A was representative of schools receiving SIG, with 85% P3s, and the remainder S3s, with the outlier of Special schools not included in this analysis.

22. Similarly, for sample B, 100 S3 schools were selected, along the same income lines as for sample A.

23. A summary of the two samples is shown in the graphic below.

Figure 35 Illustration of samples A & B



24. It is important to emphasise that although all effort was made to make the 200 schools in sample B as similar as possible to the 'comparable A', the sub-sample of 200 in sample A, differences inevitably remained. The most notable difference was in Registration of the school: many of the schools in sample A were satellite schools, indeed, for the comparative subgroup 65% were satellite, whereas in sample B all the schools were Registered. These differences are summarised in the table below.

Table 13 Summary of stage 1 sample stratification by Grant Class, income and SIG

	Sample size	No. of times SIG received	Registration	Notes
Sample A	700	5 - 6 times	Mix of Satellite and Registered	Most schools received for all years (2015-2020); all schools received at least 5 times and received in 2019 & 2020
A P3 low income	500	6 times	Mix of Satellite and Registered	
A P3 median income	100	5 - 6 times	Mix of Satellite and Registered	
A S3 low income	75	6 times	All Satellite	Only Satellite S3s get funding

A S3 median income	25	6 times	All Satellite	Only Satellite S3s get funding
Sample B	200	0 - 1 times	All Registered	Includes P3s that received in 2015, but otherwise no SIG received.
B P3 median income	100	1 time	All Registered	All P3s received SIG in 2015. Median P3s get funding if Satellite.
B S3 low income	75	0 times	All Registered	All low-income Satellite S3s get funding
B S3 median income	25	0 times	All Registered	All low-income Satellite S3s get funding

25. Within the confines of above parameters, the sample was then drawn geographically. Probability proportional to size was used to allocate sample quota in each province. Sampling of the schools was performed in STATA 16 and this process is replicable. The final sample split is summarised in Table 14.

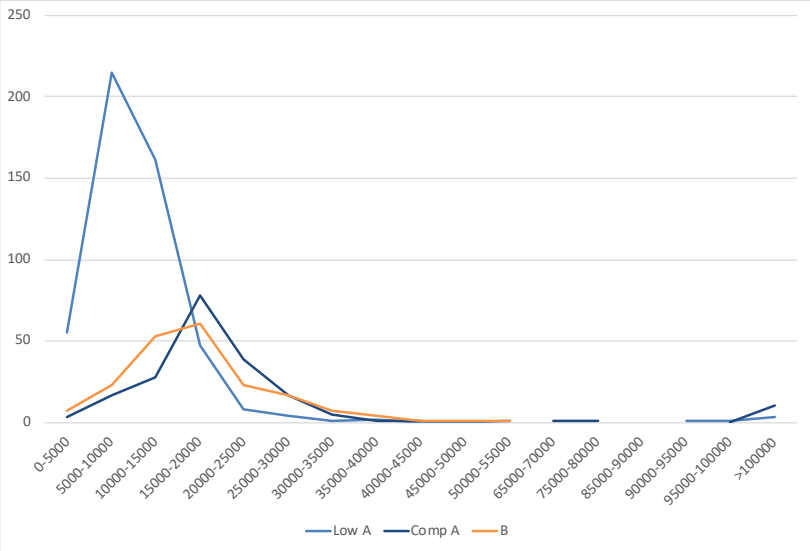
26. A total of 30 schools were replaced after at least 6 call attempts we done by both the supervisor and enumerator. The schools were replaced by schools in the exact category and province to maintain the initial sample split.

Table 14 Summary of sample frame and sample split by province.

Province	**Population**								**Sample**							
	Group A -P3		Group A -S3		Group B -P3	Group B - S3		Total	Group A -P3		Group A- S3		Group B- P3	Group B- S3		Total
	Low	Median	Low	Median	Median	Low	Median		Low	Median	Low	Median	Median	Low	Median	
Manicaland	199	30	43	11	38	21	16	358	51	18	10	4	21	9	4	117
Mashonaland Central	165	11	33	7	21	12	9	258	42	6	8	3	11	5	2	77
Mashonaland East	255	17	40	3	19	55	29	418	65	10	9	1	10	25	6	126
Mashonaland West	296	28	92	21	25	30	15	507	75	16	21	8	13	13	3	149
Masvingo	216	41	30	7	46	8	6	354	55	25	7	3	25	4	1	120
Matabeleland North	353	4	28	3	2	12	7	409	90	2	6	1	1	5	2	107
Matabeleland South	192	19	12	3	19	5	5	255	49	11	3	1	10	2	1	77
Midlands	286	19	48	10	16	28	25	432	73	12	11	4	9	12	6	127
Total	**1,962**	**170**	**327**	**65**	**186**	**171**	**112**	**2,993**	**500**	**100**	**75**	**25**	**100**	**75**	**25**	**900**

27. The income distribution of the resultant samples can be seen in the graphs below, based on EMIS data. This was first plotted against 2019 income, where there were some high-income outlier results in sample A (with SIG).

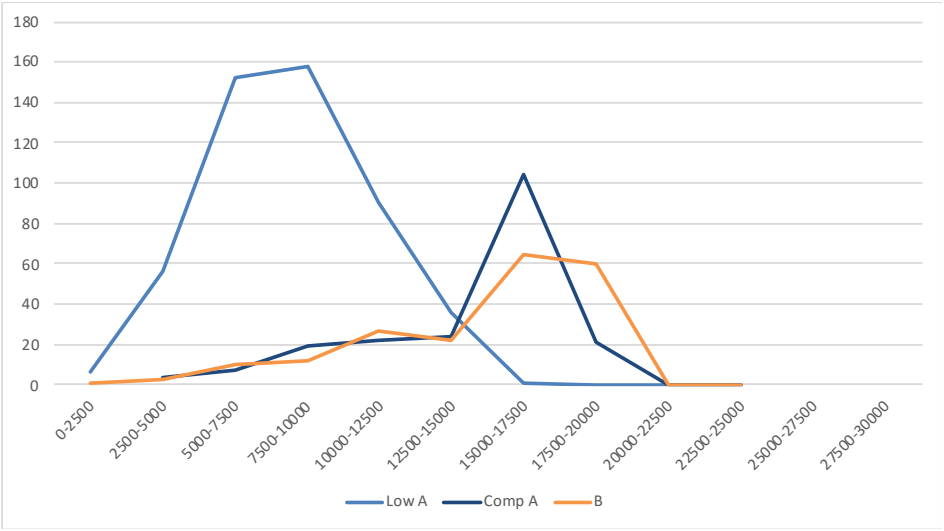
Figure 36 : Income distribution of schools sampled, Income 2019



Source: EMIS data & survey data; Mokoro analysis

28. The higher values for income disappear if the median income (2015-2019) is used instead and it can be seen that all the schools have a median income of less than 20,000 USD, and the income distributions of the Comparative A sample is similar to that of the B sample, while that of Low A (P3 schools with low income) are all under 15,000 USD and peak at a lower point, under 10,000 USD.

Figure 37 : Income distribution of schools sampled, median income 2015-2019



Source: EMIS data & survey data; Mokoro analysis

Fieldwork challenges and solutions

29. Despite the fact that the survey with head teachers was done remotely, the process was conducted relatively smoothly and the fieldwork team were able to resolve all the major challenges they faced, as described below:

Challenge	**Solution**
Network connectivity challenges	SMS were sent prior to the interview and headmasters would be at a place with better connectivity at the time of interview
A large number of headmaster transfers meant contact details were out of date	Headmasters were asked to provide contacts of the current headmaster at their previous school
Unavailability of finance staff at schools at some schools	SMS with questions to do with finances were sent prior to the interview and headmasters would gather this information before the actual interview

30. In order to quality assure and validate responses captured, supervisors called back 5% of the interviewees to check whether they were called and to do a shorter version of the questionnaire to cross check answers later. On a weekly basis the data manager then compared data collected by the enumerators with data collected by the supervisors in order to check for error rate. Where discrepancies were noted feedback was provided to the enumerators, and additional checks were put in place to ensure no further errors were made.

31. The head teachers, in some instances, went to considerable trouble to be available to participate in the survey, including travelling to other villages with better connectivity. This therefore was onerous on them, but nevertheless shows their strong commitment to SIG and is an indicator of how highly SIG is valued.

Analysis of Survey data and EMIS Data

32. The EMIS data, combined with SIG data as provided by UNICEF, gave the research team insight into the profile of schools in Zimbabwe as a whole, and specifically the schools that were targeted by SIG. Analysis was done, inter alia, on Grant Class, income levels, school size, enrolment numbers, G7 candidates and passes, all in regard to the number of times a school received SIG. A gender perspective was also applied to consider inequalities between girls and boys at enrolment in Primary and Secondary schools, and in terms of candidates for G7 exams and pass rates.

33. This information gave the team background on Zimbabwean schools, both the entire set of schools, and those schools targeted by SIG. This information was also used to inform the parameters of the sample for the survey.

34. The survey data was analysed in three main ways:

- Results from sample A (700 schools) was analysed as providing insight into the impact on beneficiary schools.

- Results from sample B (200 schools) and the 200 schools that formed the comparative A sample, were analysed side by side, to compare and contrast their experience and opinions; this analysis sometimes also included the low-income P3 sample A schools (500) as a further point of comparison.
- Sample B (200 schools) and the comparative sample A (200 schools) were then linked to EMIS data, and data on their income, enrolment, G7 candidates and pass rates was considered, alongside analysis of gender disparities.

Note on Data Limitations

35. EMIS data is self-reporting and largely unaudited. This is to say that it is not externally verified and may be subject to errors.

36. Income data contained within EMIS displayed a high level of variance from year to year. This may have been as a result of capital projects, e.g. construction of classrooms, requiring a large income some years. In certain cases, this variation is extreme – for example, there is a school which one year recorded an income of 4,416 USD and the following recorded 3.6 million USD, and then subsequently recorded 3,819 USD. Conversely there's a school that recorded in the region of 130 thousand USD every year, and in 2019 recorded just 130 USD. This degree of variation is probably a result of an error in data entry. In order to minimise the impact of misleading outliers, the income was considered in terms of percentiles, and medians (50^{th} percentiles), which are not affected by extreme values, were used in preference to means when considering school incomes of subgroups of the population such as P3s, P3s receiving SIG etc.

37. UNICEF was helpful in providing data relating to SIG disbursement. However, this data did not always contain an EMIS number, which was a weakness. School names were inconsistently spelt between the list supplied by UNICEF and the EMIS, which makes mapping one dataset onto the other challenging, as well as sometimes obscuring the existence of duplicates in the data. Furthermore, there can be multiple schools with identical names in the same district which exacerbates this issue. This could be remedied by including the EMIS number in the records UNICEF keeps of SIG recipient school. This is a weakness as it limits UNICEF's ability to check that it reaching the right schools.

38. This also represents a missed opportunity in terms of using Government systems. If UNICEF were using EMIS data, this may be another opportunity to check its validity. It would also allow UNICEF to set up a dashboard and measure parameters such as school income, enrolments and pass rates to check the SIG is being correctly assigned and the schools' eligibility for potential bonus payments where applicable.

39. The survey was designed firstly to give a reasonably representation of the SIG recipient schools, and secondly to provide a 'control group' that did not receive SIG. While, the team tried to ensure that the control group was as near as possible to a comparable subgroup of school that received SIG, a true control group was not possible as SIG was applied nationally according to specified criteria. Thus, differences between the comparable A subgroup and the B sample cannot be definitively attributed to SIG since there were other

differences between the schools in each sample, most obviously the Registration status of the schools.

Annex 4 Impact Study Questions

ISQ1.To what extent was minimum school functionality, as defined through the SIG utilisation criteria, reached as a result of SIG and if it did what impact did this have on schools? 1.1. To what extent did SIG provide well-targeted levels of funding to financially constrained schools to cover non-personnel/non-capital resource demands? 1.2. To what extent did the targeted levels of funding contribute to ensuring school functionality? 1.3. To what extent did improved school functionality contribute to a more conducive learning environment?
ISQ2. How effective is SIG in improving access to education for the poorest and the most vulnerable? 2.1. Did SIG target the most disadvantaged schools (i.e. satellite schools, Special Needs Schools)? 2.2. Did SIG facilitate increased access for the poorest by reducing school fees/levies for the poorest? 2.3. Did SIG facilitate increased access for the most vulnerable learners in particular orphans and children with disabilities? 2.4. If SIG did help improve access for the poorest and the most vulnerable what impact did this have on schools?
ISQ3. How best SIG can be improved? 3.1. What lessons can be learnt from the implementation of SIG to improve grant making in the future? 3.2. What measures need to be put in place to ensure SIG continues to meet its objectives?

Annex 5 List of people met

Table 15 Inception phase: list of people met

Name	Position	Organisation
Asimta Mutangadura	Education Specialist	UNICEF Zimbabwe
Chiharu Kondo	Grant manager, Education Section	UNICEF Zimbabwe
Hideyuki Tsuruoka	Education Specialist	UNICEF Zimbabwe
Lawrence Mkwala	Acting Deputy Director Monitoring and Evaluation	Ministry of Primary and Secondary Education
Lucinda Ramos	Senior Country Operations Officer	GPE
Mr Mafovera	Director Grant Management Team	Ministry of Primary and Secondary Education
Reshmi Majumdar	Education and Communication Consultant	UNICEF Zimbabwe
Rodrick Mandibatsira	Monitoring and Evaluation Officer Strategic Policy Planning, Research & Statistics Division	Ministry of Primary and Secondary Education
Tanya Zebroff	Education Adviser	FCDO Zimbabwe
Tumisang Thabela	Permanent Secretary	Ministry of Primary and Secondary Education

Table 16 Impact study phase: list of people met

Name	Position	Organisation
Beate Dale		KFW
Clemence Nhliziyo	Acting National Coordinator	Education Coalition of Zimbabwe
Detlef Hanen		Formerly of KFW Zimbabwe
Enock Chinyowa	Deputy Director (Infrastructure), Strategic Programme Planning, Research, and Statistics	Ministry of Primary and Secondary Education
Faith Nkala	National Director	CAMFED
Ms Wenjere	Finance and Admin Director	Ministry of Primary and Secondary Education
Mukurazhizha Tendai	Budget Review Officer	Ministry of Finance
Nathan Mafovera	Grant Management Team Coordinator	Ministry of Primary and Secondary Education
Niki Abrishamian	Chief of Education	UNICEF Zimbabwe
Rodrick Mandibatsira	Monitoring and Evaluation Officer Strategic Policy Planning, Research & Statistics Division	Ministry of Primary and Secondary Education

Shandirai Mugari	Former Acting Deputy Director Strategic Programme Planning, Research, and Statistics	Ministry of Primary and Secondary Education
Tapfuma Ronald Jongwe	Education Specialist	World Bank
Tumisang Thabela	Permanent Secretary	Ministry of Primary and Secondary Education
Vimbisai Mungoni	Education Officer	UNICEF Zimbabwe

Annex 6 Stakeholder analysis

Stakeholder	Interest in the impact study	Involvement in impact study
Internal stakeholders		
UNICEF Country Office Zimbabwe	The School Improvement Grants programme is a component of the Education Development Fund (EDF) which is managed by UNICEF. UNICEF has a direct stake in the impact study and an interest in learning what effect the SIGs are having on the most impoverished schools in the country.	The impact study is commissioned by UNICEF. Country Office staff will be further involved in workshops/feedback sessions at the beginning and end of the remote field research and will have the opportunity to comment on the draft Inception Report.
Government of Zimbabwe	The Government has a direct interest in knowing the impacts of its current school financing modality and whether the Education Development Fund is harmonized with wider national development goals.	The School Improvement Grants are implemented by the Ministry of Primary and Secondary Education and so the impact study will provide the government with evidence as to the effectiveness and efficiency of this funding modality.
Ministry of Primary and Secondary Education (MoPSE)	The School Improvement Grants are implemented by the Ministry of Primary and Secondary Education (MoPSE) and so the impact study should guide the Ministry on how best SIG can be improved and sustained as a mechanism for school financing.	The implementing Ministry will have an interest in all areas of the impact study including the.
Education Coordination Group (ECG)	All expenditure of funds is approved or endorsed by the Education Coordination Group (ECG) that is chaired by the Minister of Primary and Secondary Education, with membership that includes Government ministries (MoPSE, the Ministry of Higher and Tertiary Education, Science and Technology Development, and the Ministry of Finance and Economic Development), funding partners, Civil Society Organizations (CSOs), The World Bank, Education Coalition of Zimbabwe (ECOZI), UNICEF and UNESCO. UNICEF provides the secretariat. The	The ECG will have an interest in all areas of the study, particularly the extent to which the achievements are cost-effective and can be sustained.

Stakeholder	Interest in the impact study	Involvement in impact study
	ECG provides management and governance to the EDF.	
Education Development Fund Steering Committee	The EDF steering committee manage the fund and meet regularly to monitor progress of various components including the SIG programme. The steering committee is made up of representatives of MoPSE, UNICEF, FCDO, KFW and other education partners.	The committee will have an interest in all areas of the study, in particular the impact that SIG funds are having on the school system, and the extent to which achievements to date are sustainable.
External stakeholders		
SIG Donors (FCDO and KfW)	All funds from SIGs are contributed by EDF partners FCDO and the German Development Bank who will have a direct interest in the impact study in all areas including value for money and any misappropriation of funds as highlighted by the verification studies.	The findings of the impacts study will be used to inform strategic decisions around the use of funds for future programming, including ongoing support of the SIG
Other relevant donors to the education sector (GPE)	The Global Partnership for Education have been one of the biggest donors to the education sector in Zimbabwe. GPE work with grant agents (UNICEF) and coordinating agencies (FCDO). GPE funding complements that of the SIGs, e.g. WASH funding for schools, and so they have a vested interest in understanding the impact of the SIGs.	The findings of the impacts study will be used to inform strategic decisions around the use of funds for future education programmes.
Beneficiaries (Headteachers from SIG-funded and non-SIG-funded schools, School Improvement Committees)	As the ultimate recipients of the School Improvement Grants, the beneficiaries have a stake in UNICEF/MoPSE determining whether its school financing is appropriate and effective.	Beneficiaries have a stake in determining and influencing whether the assistance they receive from SIG is appropriate and effective, and is having the expected impact.
Consulting organisations (Audit firms)	Have an interest as these firms play an important role in the annual verification studies. These firms will be interested to know the extent to which this study can shed more information on expenditure at school level and to understand what is influencing spending patterns.	It will be important to establish the extent this SIG impact study verifies important findings noted in the verification studies, which in turn could influence the nature of verification studies in the future.

Annex 7 Data collection tools

Interview Questions

1. The overarching aim of SIG is to improve access to education for the poorest, do think this is being achieved? {Please explain your answer}
    a. What for you are the key socio-economic challenges at the moment, other than the Covid-19 pandemic, that are undermining the well-being of young people in Zimbabwe?
    b. To what extent do you think the SIG is addressing these challenges – is SIG appropriate for the context?
    c. Are there areas where SIG has not been as effective?

2. To what extent is SIG meeting its goal of providing funding to the schools targeted (i.e. financially constrained schools)?
        i. Are the right schools being targeted?
        ii. Is the grant sufficient?
        iii. Do the eligibility criteria make sense?
        iv. Do the eligibility criteria enhance equity?

3. Is SIG funding the right things – i.e. non-personnel/ non-capital resources?
    a. Are there any apparent gaps in the eligibility criteria of SIG?
    b. How well do you think SIG has adapted/responded to changes in national needs and priorities?
    c. Do you believe SIG is making a difference?

4. At the strategic level what do you think is promoting the effectiveness of the SIG in the achievement of its results? What do you think is hindering the effectiveness of SIG?

5. How best could SIG be improved, if at all?

6. Reflecting on what SIG has achieved, and the lessons learned, what for you are the key strategic options for SIG in the next programming cycle?

Key Questions for Focus Groups

Notes:

Parents' involvement in the school will differ, ideally you want to find a few who are members of the School Development Committee. Ideally these parents should have some knowledge and experience of the school development planning and use of SIG monies at the school (It is fine for you to explain the purpose of this research – namely to assess the impact of SIG on schools).
They will also have a view of whether their children are doing well/better than they might have done (especially if there are older siblings) as a result of SIG. It would be interesting to know whether they attribute SIG to the Ministry or others, but this will have to be asked indirectly (as a question about GoZ's contribution to their children's school vis a vis their own contributions might bias their answer, especially if they are in arrears with paying the development levy etc).
You could also ask about the community served and whether the most disadvantaged have been targeted, whether textbooks have been available for their children, the physical state of the school and any other comments about the state of the school.

Questions

1. Background questions: [*Try to keep Q1 as short as possible, no more than a few minutes*]
    a. How long have you all been members of the School Development Committee?
    b. How often do you meet?
    c. Were you involved in preparing the School Development Plan?
        i. if yes how long ago did you prepare the plan?
        ii. What are the major improvements identified in the School Development Plan?
        iii. How much of the plan has already been completed/funded?

2. Have there been any noticeable changes in the school over the past two to three years?
    a. (*Probe: With this question, obviously, things may have got worse due to underlying changes in the political-economic situation, so this may need some teasing out)*
    b. Have there been any noticeable improvement in aspects of the school (e.g. any repairs, new equipment, access to learning materials, furniture)
    c. If yes, what do you attribute these improvements?
    d. If yes, have these changes made any difference for the learners?
    e. Please describe the change/impact this has had on learners.
        i. (*Establish to what extent the parents are pleased with progress children are making at the school, and*
        ii. Whether the school is functioning better as a result of these changes)

    f. Do you know who funded these changes?
        i. Probe to establish the sources of these funds – was it just because of SIG, or from MoPSE, *parental contribution, from a church, from a charity or some other source)*

3. If SDC members are aware of SIG:
    a. Is SIG funding the right things at the schools (criteria)?
        i. If not what should it be funding – why do you say that?
        ii. Currently, the grant comes as a lump sum in USD. Is this the most useful for your school?
        iii. Is it best that the grant comes as a lump sum annually or would it be better if portions of the grant arrived each term?
        iv. (Probe: *From the survey, some schools seem to receive it USD and can use Nostro accounts, and others complain that it's not received in USD and that they can't use Nostro – it'd be good to understand this issue better)*
    b. Do they think SIG is making a difference?
        i. If yes, please describe the difference
        ii. If no, why?
    c. Is SIG helping improve access in any way?
        i. If yes, please describe
        ii. If no, why?
    d. Does the SIG have any unintended consequences?
        i. *Probe to establish if the group has a view on the process to access the funds, and/or*
        ii. *Whether it means that parents are now reluctant to pay the development levy.*
    e. What could be done to improve the SIG process?
        i. Probe the following issues:
            1. What effect does delayed disbursement have on the school?
            2. If SIG could be spent on construction, would schools spend all of it on construction and what would these mean for other areas that need funding such as learning materials, furniture etc?

4. Are there any school going age children who are excluded from attending this school?
    a. If yes, what are the reasons?
    b. (*Probe: is it because they are orphans, the children are disabled or is it because their parents cannot pay the development levy?]*

SIG School Survey

SIG school survey

Research Assistant's Name

- ◯ Beatrice
- ◯ Blessing
- ◯ Daniel
- ◯ Edwin
- ◯ Gary
- ◯ Ireen
- ◯ Kudzayi
- ◯ Mellissa
- ◯ Melody
- ◯ Patience
- ◯ Precious
- ◯ Shallom
- ◯ Sibongile
- ◯ Tafadzwa
- ◯ Tichaona
- ◯ Tinashe
- ◯ Victor
- ◯ Vuyelwa

SECTION A: School Characteristics

This section is filled prior to the interview

SAMPLE GROUP

- ◯ A
- ◯ B

» SAMPLE GROUP A

province

- ◯ Manicaland
- ◯ Mashonaland Central
- ◯ Mashonaland East
- ◯ Mashonaland West
- ◯ Masvingo
- ◯ Matabeleland North
- ◯ Matabeleland South
- ◯ Midlands

district

emis

school

» SAMPLE GROUP B

province1

- ◯ Manicaland
- ◯ Mashonaland Central
- ◯ Mashonaland East
- ◯ Mashonaland West
- ◯ Masvingo
- ◯ Matabeleland North
- ◯ Matabeleland South
- ◯ Midlands

district1

emis1

school1

INTRODUCTION

SAMPLE GROUP A - We are currently conducting an impact study of the School Improvement Grant that the Ministry has been distributing to targeted schools. Obtaining feedback from schools is vital to understand the impact that SIG is having on schools. As part of the impact study we would like to ask you a few questions about different aspects of SIG. As this survey focuses on different aspects of SIG, you might need to refer to your school records where applicable. Please complete the survey as accurately as possible. The survey should take about 30 - 45 minutes. Your responses are completely anonymous and all information will be kept strictly confidential. Thank you for your response!

SAMPLE GROUP B- We are currently conducting a research study on behalf of MoPSE and UNICEF, with a particular focus on the School Improvement Grant. Your school may have received the SIG grant partly (AT LEAST ONCE), and we would still like to ask you a few questions about the financial resources of your school. Obtaining feedback from schools is vital to understand the current economic status of schools in Zimbabwe. As this survey focuses on different aspects of your school's financial status, you might need to refer to your school records where applicable. Please complete the survey as accurately as possible. The survey should take about 30 minutes. Your responses are completely anonymous and all information will be kept strictly confidential. Thank you for your response!

Respondent Name

Designation of Respondent

- ◯ Headmaster
- ◯ Deputy Headmaster
- ◯ Senior Teacher
- ◯ Teacher in Charger
- ◯ Teacher
- ◯ Other

Please specify

SECTION B: Parental Contribution, School Development Committee and School Development Plan

4.What are the main income sources for this school? (Please tick all that apply)

- [ ] School fees
- [ ] School levies
- [ ] Donors/charity
- [ ] Income generating activities
- [ ] Other

4. Please specify

_____

5. What was the school's total income in January 2020, in Zim Dollars (RTG)?

Please include all sources of income, e.g. Government income, parental fees and levies, charitable or church donations, including SIG if relevant.

_____

6.1 What percentage of parents pay the development levy?

Please give an answer to the nearest 10% (e.g. 60%)

_____

6.2 How has the percentage of parents paying the development levy changed over the last five years?

- ◯ Increase in parents paying
- ◯ No change
- ◯ Decrease in parents paying

6.3 What percentage of parents contribute to the school, through paying the development levy, providing payment in kind, volunteering or other involvement?

Please give an answer to the nearest 10% (e.g. 60%). Note to enumerators: this percentage must be equal or higher than answer to 6.1

_____

7.1 Do you have a School Development Committee (SDC)

- Yes
- No

7.2 Did it draw up a School Development Plan (SDP)

- Yes
- No

8. When last was your School Development Plan (SDP) revised?

- It has never been revised
- This year
- Last year
- Other (please specify)

9. Please Specify

_____

SECTION C: School Resources

Please indicate your agreement or disagreement with the following statements, where 1 = Strongly disagree and 5 = Strongly Agree

_____

10. Parents are able to pay the fees of the learners who attend this school

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither agree nor disagree
- ◯ Agree
- ◯ Strongly Agree

11. Parents are able to pay the levies of the learners who attend this school

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither agree nor disagree
- ◯ Agree
- ◯ Strongly Agree

12. The most vulnerable learners in our community are able to access this school

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither agree nor disagree
- ◯ Agree
- ◯ Strongly Agree

13. All boys and girls of school age in our community attend school

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither agree nor disagree
- ◯ Agree
- ◯ Strongly Agree

14. This school has sufficient basic teaching and learning materials (e.g. blackboard chalk, pens, pencils, exercise books, textbooks)

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither agree nor disagree
- ◯ Agree
- ◯ Strongly Agree

15. This school has sufficient funds to cover school office costs (e.g. stationery, toner/ ink)

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither agree nor disagree
- ◯ Agree
- ◯ Strongly Agree

16. There are sufficient desks and chairs for use in the classroom by pupils and teachers

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither agree nor disagree
- ◯ Agree
- ◯ Strongly Agree

17. The school has sufficient sanitation facilities available for both sexes (i.e.1 squat hole for 20 boys and 1 for 25 girls)

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither agree nor disagree
- ◯ Agree
- ◯ Strongly Agree

18. Where is closest safe drinkable water for learners and teachers?

- ◯ Within the school
- ◯ Just outside the school premises
- ◯ Bring it from home
- ◯ We don't have any
- ◯ Other

18. Please Specify

19. Does your school have a Home Grown Sustainable Feeding (HGSSF) program?

- ◯ Yes
- ◯ No

20. Is it supported by SIG funds?

- ◯ Yes
- ◯ Partially
- ◯ No

21. Does your school engage in any other income generating activities besides the HGSSF program?

- ◯ Yes
- ◯ No

22. Are these other income generating activities supported by SIG funds

- ◯ Yes
- ◯ Partially
- ◯ No

23. Please list the two biggest resource needs of your school (e.g. teaching and learning materials, furniture, toilets) (don't read out the list)

- [ ] a) Inputs to support Home Grown Sustainable School Feeding (HGSSF)
- [ ] b) Transporting textbooks
- [ ] c) Transporting materials purchased for repairs or construction
- [ ] d) Special needs equipment
- [ ] e) Safe drinkable water
- [ ] f) Sufficient sanitation facilities available for both sexes
- [ ] g) Furniture
- [ ] h) Repair school infrastructure
- [ ] i) Teaching and learning materials
- [ ] j) Other (please specify)

23.1 Please speify

SECTION D: School Improvement Grant (SIG)

Please indicate your agreement or disagreement with the following statements, where 1 = Strongly disagree and 5 = Strongly Agree

24. The SIG eligibility criteria are easily understood

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither disagree nor agree
- ◯ Agree
- ◯ Strongly Agree

25. The SIG eligibility criteria cover the needs of my school

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither disagree nor agree
- ◯ Agree
- ◯ Strongly Agree

26. The SIG is targeting the most vulnerable schools

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither disagree nor agree
- ◯ Agree
- ◯ Strongly Agree

27. The SIG amount is sufficient for needs of my school as articulated in our School Development Plan

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither disagree nor agree
- ◯ Agree
- ◯ Strongly Agree

28. Is there one other criteria which should be eligible for funding under SIG?

{Please list one additional criteria only}

_____

29 What are the two most important things that the SIG payment has improved at your school? (don't read out the list)

- ☐ a) Inputs to support Home Grown Sustainable School Feeding (HGSSF)
- ☐ b) Transporting textbooks
- ☐ c) Transporting materials purchased for repairs or construction
- ☐ d) Special needs equipment
- ☐ e) Safe drinkable water
- ☐ f) Sufficient sanitation facilities available for both sexes
- ☐ g) Furniture
- ☐ h) Repair school infrastructure
- ☐ i) Teaching and learning materials
- ☐ j) Other

Please specify

_____

31. How would you pay for these improvements listed if there was no SIG payment?

- ◯ General School Funds
- ◯ Increase the parental contributions
- ◯ We would not be able to pay for this without SIG Funds
- ◯ Other (please specify)

32. Please, specify

33. What for you is the biggest advantage of SIG?

34. What for you is the main disadvantage of SIG?

35. Thinking about the whole SIG process – and in relation to the current challenges your school is facing - can you suggest any improvements to the SIG process?

SECTION E: COVID-19

Please indicate your agreement or disagreement with the following statements, where 1 = Strongly disagree and 5 = Strongly Agree

36. Our school is able to make and pay for adjustments to meet Covid-19 guidelines

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither disagree nor agree
- ◯ Agree
- ◯ Strongly Agree

37. Covid-19 has made it difficult for many people to work, thus decreasing people's income in our area

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither disagree nor agree
- ◯ Agree
- ◯ Strongly Agree

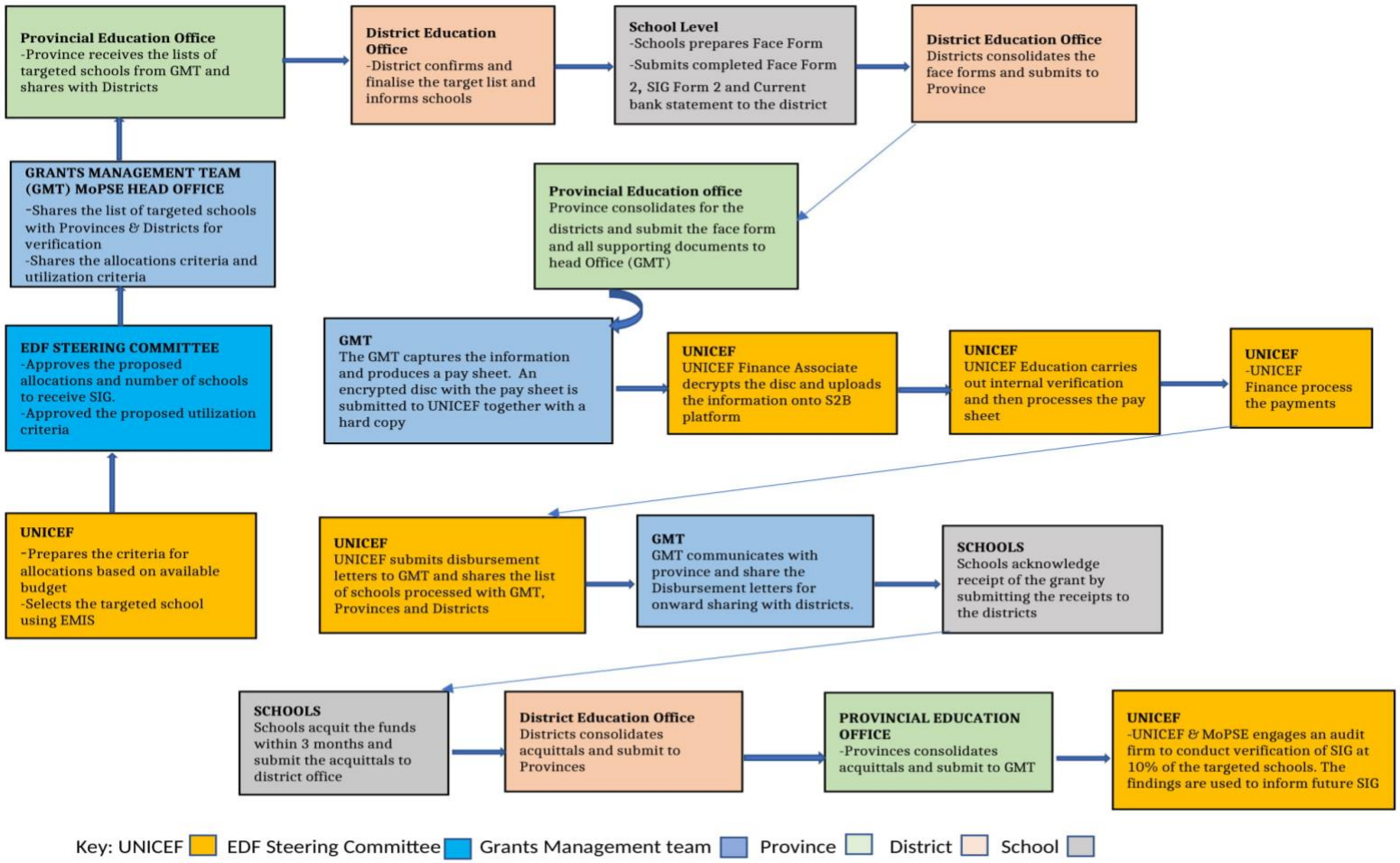
38. Parental contributions will decrease due to the economic impact of Covid-19

- ◯ Strongly disagree
- ◯ Disagree
- ◯ Neither disagree nor agree
- ◯ Agree
- ◯ Strongly Agree

39. Estimate how much the parental contribution will decrease by

- ◯ <25%
- ◯ 25-50%
- ◯ 50-75%
- ◯ >75%

Annex 8 School Improvement Grant payment process



Annex 9 Shifts in SIG eligibility criteria[20]

<table>
<tr><th>Component</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th><th>2020</th></tr>
<tr><td>Replacing fees or levies for OVCs</td><td colspan="3">Pupils identified and approved as OVCs as defined by BEAM by community committees and the school headteacher but not covered by BEAM</td><td colspan="5">None</td></tr>
<tr><td>Teaching and Learning Materials (TLM)</td><td colspan="3">• Teaching guides and facilitation materials approved by MoESAC/ MoPSE
• Science kits and laboratory supplies
• Small teaching and learning equipment, such as compasses, protractors, etc
• Blackboard chalk
• Pens, pencils and markers
• Exercise books and workbooks approved by MoESAC/ MoPSE.
• Readers and ‘big books’ approved by MoESAC/ MoPSE.
• Library books.
• Software for teaching and learning.</td><td colspan="5">• Teaching guides and facilitation materials approved by MoPSE.
• Science kits and laboratory supplies.
• Small teaching and learning equipment, such as compasses, protractors, etc.
• Blackboard chalk
• Pens, pencils, markers and exercise books.
• Readers and textbooks approved by MoPSE[a]</td></tr>
<tr><td rowspan="2">Special needs provisions</td><td>• Adapted TLM and small equipment, such as hearing aids, to support the mainstreaming of special needs pupils in schools.
• Minor adaptations to facilitate access.</td><td colspan="2">• Adapted TLM and small equipment, such as hearing aids, to support the mainstreaming of special needs pupils in schools.</td><td colspan="5">• Adapted TLM and small equipment, such as hearing aids, to support the mainstreaming of special needs pupils in schools.
• Software for teaching and learning (for special schools with special education resource units only)
• Adapted toilets and hand washing units or basins to support the mainstreaming of special needs pupils in schools.</td></tr>
<tr><td colspan="4">• Utility bills (water & electricity) in Special Schools only (Maximum 10% of SIG can be used on this line item)</td><td colspan="4">N/a</td></tr>
</table>

[20] Table denotes eligible items, as per SIG Eligibility Criteria issued annually between 2013 and 2020 by MoPSE.

Component	2013	2014	2015	2016	2017	2018	2019	2020
School running costs	• Electricity and water bills • Office supplies, including stationery, pens, pencils and other small items • Travel and subsistence for legitimate school administrative purposes approved by the finance committee			• Transporting materials purchased for repairs or construction • Travel and subsistence for SIG related administrative purposes approved by the finance committee such as getting quotations	• Transporting materials purchased for repairs or construction		• Transporting textbooks and materials purchased for repairs or construction • Office supplies, including stationery, pens, pencils and other small items	
Furniture	• Purchase of school desks and chairs for use in the classroom by pupils and teachers. • Repair of school desks and chairs for use in the classroom by pupils and teachers. Adapted desks and other school furniture to support the mainstreaming of special needs pupils in schools							
							Purchase of Chubb door, safe and screen door for safe room	
Water and sanitation	• Rehabilitation of water and sanitation infrastructure for which funds have been approved. • Adapted toilets and hand washing units or basins to support the mainstreaming of special needs pupils in schools.	• Construction and rehabilitation of water and sanitation infrastructure for which funds have been approved. • Toilets and toilet blocks, boreholes, water supply pipes, hygiene equipment such as wash basins and other hand washing structures based on school priorities. • Adapted toilets and hand washing units or basins to support the mainstreaming of special needs pupils in schools.		• Toilets and toilet blocks, hygiene equipment such as wash basins and other hand washing structures based on school priorities			• Toilets and toilet blocks, hygiene equipment such as wash basins and other hand washing structures (including mass handwashing stands) • Water purification tablets and water guard. • waste disposal facility and the purchase of sanitary pads	

Component	2013	2014	2015	2016	2017	2018	2019	2020
Infrastructure construction and rehabilitation	Minor repair of broken items and areas of school infrastructure, including beam filling, windows, doors, ceilings, classroom fittings, painting	• Construction and rehabilitation of school learning rooms for which funds have been approved. • Learning rooms based on school priorities. • Rehabilitation of major items of degraded learning rooms, including the replacement of damaged or sub-standard infrastructure, such as damaged roofs and walls of buildings for which funds have been approved. • Ramps, paths, rails and other structures to support the mainstreaming of special needs pupils in schools.		• Building materials for school construction - **only satellite schools can construct school buildings using SIG**. • Rehabilitation of major items of degraded learning rooms, including the replacement of damaged or sub-standard infrastructure, such as damaged roofs and walls of buildings for which funds have been approved. • Minor repair of broken items and areas of school infrastructure, including windows, doors, ceilings, classroom fittings • Ramps, paths, rails and other structures to support the mainstreaming of special needs pupils in schools. **Please note:** • Construction should only be done on lands approved, mapped, and pegged as permanent site for schools by the relevant authorities. • A written permission to construct from the Permanent Secretary should be acquired/sought prior to construction. • Construction should be in compliance with MoPSE standards including, but not limited to, involvement of the E.O Buildings to approve stages of the construction.			• Minor repair of broken items and areas of school infrastructure, including windows, doors, ceilings, classroom fittings • Ramps, paths, rails and other structures to support the mainstreaming of special needs pupils in schools **N/B: No construction in 2019 or 2020 for Satellite schools or major rehabilitations for Registered P3 school**	
Personnel: salaries and allowances	None							
Income generating activities to support school	• None			• Inputs for viable income generating activities such as seeds, plants, fertilizer, animal husbandry (chickens, piglets, rabbits etc), apiaries (bee-keeping), feeds and small irrigation equipment (water tanks, gardening tools, drip kits).				

Component	2013	2014	2015	2016	2017	2018	2019	2020
				• Inputs to support school feeding and school development programmes. • **Maximum 10% of SIG can be used on this line item**	• Inputs to support Home Grown Sustainable School Feeding (HGSSF). **Maximum 20% of SIG can be used on this line item**		• Inputs to support Home Grown Sustainable School Feeding (HGSSF). • Costs of tools for growing food for school garden when it is used for the HGSSF programme **Maximum 20% of SIG can be used on this line item**	

[a] Since 2019, readers and textbooks relating to Heritage studies and Religious studies cannot be procured using donor funds.

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