

CHAPTER 1

INTRODUCTION

Context

Zambia is a country in the Sub-Saharan region whose government is committed to educational provision for all school-aged children in the nation. However, due to the pervasiveness of poverty and HIV/AIDS throughout the country, in addition to insufficient teacher training and teacher deployment to schools, educational provision for both primary and basic school students is severely compromised. A potential solution to these problems might be the use of short-term, in-service programs focused on basic teacher training information. The purpose of this research study is to determine whether in-service, on-site teacher training has an impact on the teaching ability of basic school teachers in rural and urban Zambian schools.

Two recent events provided an international context that contributed to shaping educational provision in Zambia. The first event was the World Conference on Education for All held in Thailand in 1990. It was organized to alleviate widespread concern over the inadequacy and deterioration of education systems during the 1980s, and concern for the millions of children and adults in many third world countries who remain illiterate. The conference was convened by the United Nations Development Programme (UNDP), the United Nations Educational, Scientific and Cultural Organization (UNESCO), the United Nations Children's Fund (UNICEF), and the World Bank (Lungwangwa et al., 1999). A

total of 155 governments participated, which included government officials representing Zambia. Participants agreed to take the necessary steps to universalize primary education and reduce illiteracy before the end of the decade (Lungwangwa et al., 1999).

The second event, the United Nations Millennium Declaration, occurred in the year 2000. This declaration was a seminal occurrence and constituted an unprecedented promise by world leaders to address, as a set of simple but powerful objectives, peace, security, development, human rights and fundamental freedoms (United Nations, 2005). Zambia was among 190 countries that adopted the Millennium Development Goals and committed to meeting the following eight goals by the year 2015: 1) eradicate extreme poverty and hunger; 2) achieve universal primary education; 3) promote gender equality and empower women; 4) reduce child mortality; 5) improve maternal health; 6) combat HIV/AIDS, malaria and other diseases; 7) ensure environmental sustainability; and 8) develop a global partnership for development (United Nations, 2005). These two events provide an international backdrop for the exploration of teacher training in Zambia and its impact on primary school education.

Zambia is a democratic republic located in Sub-Saharan Africa, having gained its independence in 1964 from Great Britain following forty years of direct rule by the British (Küster, 1999). At the time of independence there were only 961 college graduates in the country, all of whom attended a university outside of Zambia since there were no universities or colleges in the country prior to 1966

(Kelly, 1999). Immediately after independence the state government acquired almost total control of the educational system and quickly expanded it (Carmody, 2004). In 1966 the University of Zambia was opened, and between the years 1966 and 1977 five new primary teacher-training colleges were opened, in addition to two new secondary teacher- training colleges. At independence, the country already had six teacher-training colleges, which brought the total number of teacher-training colleges in Zambia to thirteen (Manchishi, 2004).

The current teacher education course utilized by these teacher training schools, known as Zambia Teacher Education Course (ZATEC), was written in 1997 by the Ministry of Education. With financial assistance from the Danish International Development Agency (DANIDA), the program was established with the objective of developing a national and cost-effective strategy for teacher training which would increase the number and quality of trained teachers in Zambia (Ministry of Foreign Affairs of Japan, 1999). “The course seeks to develop competencies, which allow teachers to plan, implement and evaluate effectively pupil learning, taking full account of the need of the nation, the community, the school and the learner” (Manchishi 2004, p. 7). The goal of the Zambia Teacher Education Course was to graduate 4,000 teachers annually, since only 1,900 teachers had graduated annually from the teacher-training colleges prior to 1994 and the nation was in dire need of primary school teachers. (Carmody, 2004). It is a two year program with the first year comprising students enrolled in both theories of learning and theories of teaching courses in a college

setting. The second year the students teach in the school system under the supervision of mentors.

The curriculum stresses literacy and numeracy objectives and it attempts to integrate the courses into different subject areas to provide a relevant curriculum for the pre-service teachers (Manchishi, 2004). The curriculum includes six study areas: education studies (sociology and psychology of education), mathematics and science (math, general science, agriculture, geography), expressive arts (art, music, dance, physical education), literacy and language education (local languages, English), social, spiritual and moral education (history, geography, civics, religious education, moral education), and technology studies (design, home economics, industrial arts, technology) (Carmody, 2004). This curriculum is a radical change from previous methods of studying each of these subjects separately, and the hope is that teachers will be better prepared to teach following their limited study time of one year in a teacher training college. The mentoring program during the second year is designed to help the pre-service teachers gain experience under the supervision of a local school mentor and a college tutor.

Teacher education colleges have three levels of training. The first level is the certificate level, which prepares students to teach in Grades 1 – 7 in lower and middle primary schools. To enter these colleges, students must have a Grade 12 Certificate or a General Certificate of Education. The study time for this certificate is two years, with the first year in college and the second year teaching in a classroom. There are currently ten teacher training colleges that give certificates.

The second level is the diploma level, which is required to teach in upper basic education Grades 8 and 9. These students have an additional one year program (or one and a half years by distance learning) and also specialize in two teaching subjects. There are five colleges these students can attend to obtain a diploma, all of which include a distance learning program. The third level is the degree level for teachers of Grades 10-12 in secondary schools, and comprises two additional years of study beyond a certificate program. Students must attend a college affiliated with the University of Zambia to obtain their degree (Manchishi, 2004).

Interestingly, teachers of commercial subjects such as agricultural science and industrial arts are trained in institutions which are not teacher training colleges and are under the auspices of government ministries other than the Ministry of Education (Manchishi, 2004).

While the Ministry of Education has established the requirements to qualify people to teach, some of the teachers actually teaching in the classrooms have not completed these requirements. In a 1998 survey sponsored by UNESCO and the Ministry of Education, the teaching qualifications of all sixth grade teachers throughout the nine provinces of Zambia were recorded. All primary teachers of Grades 1 to 7 in Zambia are expected to have completed a minimum of twelve grades of primary and secondary education, as well as two years of pre-service teacher training. The research showed that 81 % of all sixth grade teachers completed Grade 12 and 58 % completed the two pre-service years of training. However, results from the same survey revealed that 96 % of Grade 6 students

attended schools where their headmasters had completed the required two years of pre-service teacher training (Nkamba & Kanyika, 1998).

Fortunately, these statistics are now out of date; standards of teacher education have risen since the late 1990s. During recent research in Choma District, I found that 86 % of the 148 teacher participants in this study have completed the required two years of teacher training. In addition, many of these teachers, especially those teaching Grades 7 and 8, are taking classes towards their diplomas or have already completed them.

Teacher training in Zambia is burdened with the commitment to provide educational opportunity for all primary age children alongside the realities of life in the nation. A major obstacle to the attainment of the 1990 Education for All and the 2000 Millennium Development Goals objectives is the inordinately high percentage of Zambians with HIV/AIDS. According to the 2002 Zambia Demographic Health Survey, 16.5 % of the population aged 15 - 49 is HIV positive (Organisation for Economic Co-operation and Development, 2005). Approximately 21.5 % of the total population of Zambia is estimated to have HIV/AIDS, with higher numbers of professionals, including teachers, infected (Wood, Berry, Tambulukani, Sikwibele, & Kanyika, 2003). Due to the scourge of HIV/AIDS, life expectancy at birth is currently only 38 years (UNICEF, 2005). Additionally, by 2010, Zambia's population of primary school age children is expected to be about three-quarters of a million less than it would have been without HIV/AIDS (Kelly, 2000).

Education provision has been enormously impacted by HIV/AIDS, with 6 % of teachers lost each year to HIV/AIDS (Zambia National Submission, 2004). In 1999, more teachers died of HIV/AIDS than passed teacher training programs (BBC News, 2000, April 24). Kelly (2000) states that the prolonged illness of teachers with HIV/AIDS creates a very difficult situation for rural schools because, not only are they frequently absent from their classroom, but when they become very sick they ask for transfers to urban areas so they are closer to medical facilities. This leaves vacancies in the rural schools which, if filled, are usually given to inexperienced teachers. In addition, these HIV/AIDS infected teachers are kept on the payroll until they die, creating even more financial distress within the Ministry of Education budget (Kelly, 2000). The 1999 Zambian Ministry of Health Report notes there are decreasing numbers of trained teachers, increased teacher absenteeism, reduced public finance for schools, more orphans with less access to education, and fewer children able to afford, attend, or complete school (Malambo, 2000; Nakacinda, Libindo, & Msango, 2001).

In addition to the endemic HIV/AIDS problem, educational provision is also aggravated by the rampant poverty in Zambia. With a population of over 11 million, Zambia ranks 143 out of 162 on the 2001 United Nations Human Development Report (Verhagen, 2002). The majority of the population, 73 %, is classified as living below the poverty line. Income is unequally distributed, with the top 20 % of the population receiving 57 % of the per capita income, while the bottom 40 % receive 11 % (Verhagen, 2002). Furthermore, poverty is more

prevalent in rural areas, where it affects 83 % of the population, than urban areas, where 56 % are affected by poverty (Henriot, 2005, September 3). Poverty-related malnutrition is widespread and continues to jeopardize Education for All in Zambia (Malambo, 2000).

Poverty and HIV/AIDS have an enormous negative impact on education in Zambia. At the primary level, only 68 % of girls are enrolled in school, and only 69 % of boys attend primary school. The numbers greatly decrease at the secondary level; only 21 % of both males and females attend secondary school (United Nations, 2005). This sharp decline occurs because primary education (Grades 1 to 7) is now tuition-free for everyone, but school fees are a prerequisite to attending Grades 8 to 12. Because of the extremely high level of poverty in the country, many parents simply cannot afford the school tuition.

The picture indeed looks grim. A recent editorial in the Lusaka Post states that while Zambian political leaders are claiming that the economy has improved, in reality both unemployment and poverty are on the upswing (The Post [Online], 2006). The editor continues that it is a matter of urgency that the nation devise a workable strategy to create jobs in the rural areas. “We cannot continue to wait for more than 15 years in the hope that some private investors will be miraculously attracted to these areas. We have to find a solution to the job crisis in these areas and it is our collective duty to do so” (The Post [Online], 2006). Educational provision is greatly affected by the rising poverty and unemployment throughout Zambia. Since governmental leaders view the increase of educational provision as

the primary means of attaining economic stability in Zambia, increasing teacher effectiveness within the classroom is essential to achieve this objective.

Research Question

Improving educational provision for school-age children in Zambia seems overwhelming. Rampant poverty, HIV/AIDS infections, and limited finances available from the Ministry of Education for the education budget all impede the attainment of educational goals. In an effort to contribute to the education of Zambian children, this study addressed the question of whether short-term, in-service teacher training influences the teaching practice of rural and urban basic school teachers in Zambia. Do in-service, on-site teacher training interventions impact the behavior of rural and urban basic school teachers in Choma District, Zambia? Will in-service teacher training seminars facilitate the attainment of the Education for All objective and the Millennium Development Goals agenda? An ancillary question examined relationships between the questionnaire used in the study and demographic information obtained from the teachers: years of teaching experience; years of completed education; and gender. For example, how does teaching experience relate to teacher use of available resources? Are teacher/student interactions affected by gender? Does teacher training education influence methods and techniques used by teachers? These auxiliary questions were explored to determine if they contributed relevant information to the primary question.

Definition of Terms

Three explanations of commonly used terms in this research are essential to fully understand this study. The first clarification is the distinction made between primary schools and basic schools. The literature about educational provision in Zambia uses the terms primary education and secondary education, with few references to basic education. In the past, the name primary was used to refer to Grades 1 to 7, the terms upper primary or basic applied to Grades 8 and 9 and secondary was used to indicate Grades 10 to 12. Currently, the majority of primary schools are referred to as basic schools, which indicates Grades 1 to 9 are part of these schools. All six of the schools involved in this research are basic schools, meaning they have classes for students from Grade 1 to Grade 9. Most of the schools which are called primary schools in the literature are now identified as basic schools in Zambia. Some confusion exists because primary education, Grades 1 to 7, is tuition-free for students, whereas students in Grades 8 and 9, which are included in all basic schools, are charged a school fee. In addition, enrollment in Grades 8 and 9 is currently available at both basic schools and secondary schools. For example, a student in Grade 8 or 9 could attend school at Sikalongo Basic School or at Sikalongo Secondary School. According to teachers and administrators at these schools, the quality of education is superior at the secondary school and only the highest achievers from Grade 7 can enter Grade 8 at the secondary school. The lower achieving students either attend Grade 8 at the basic school or drop out of school, if tuition is a deterrent. The headmaster at

Sikalongo Basic School indicated by 2015 all Grades 8 and 9 will be part of basic schools throughout Zambia and all secondary schools will be high schools, meaning only Grades 10, 11, and 12 (A. Muchimba, personal communication, August 3, 2006). Therefore, the current literature regarding schools in Zambia should identify schools as either basic or secondary schools. This study concentrated on teacher training at six basic schools in Choma District.

A second clarification of the literature on educational provision is the distinction between rural and urban schools in Zambia. A working document from the National Education Statistics Information Systems states the definition of urban areas in Zambia as localities of 5,000 or more inhabitants, the majority of whom depend on non-agricultural activities (Wako, 2005). This report continues that the classification of schools in rural areas is a complicated matter because a school may be located in an urban area according to the definition, but a considerable number of students may come to school from outside the town to attend that school. Further explanation came from the Lusaka Central Statistical Office definition which states a rural area is one in which both an agrarian economy predominates and there is the existence of a pattern of villages and communities engaged in agrarian pursuits. An urban area is defined as one which has some social activities and services, such as piped water, and in which the majority of economic income is not derived from agricultural sources (Mutanekelwa & Mweemba, 2004). Among basic school teachers in Zambia, this distinction is an important one, because teachers in rural areas receive as much as 20% additional salary as “rural hardship”

compensation, since many of the rural schools do not have the availability of electricity or running water. For some rural teachers the extra pay is adequate compensation for the additional physical inconveniences they endure, but for others the hardship is too great and they would prefer to be in urban schools

The Central Statistical Office findings are that 62% of the population in 1998 was rural and 38% was urban (Mutanekelwa & Mweemba, 2004). Professor Longe, a UNESCO consultant, confirms the high rural population of Zambia, stating 60% live in rural areas (Longe, 2003). Since the population of Choma is listed as the 17th largest city in Zambia, with a population of 40,405 in the year 2000, and has piped water available to most areas of the town, the three schools in Choma - Nahumba Basic School, Shampande Basic School and St. Patrick's Basic School - are considered urban schools even though they are not located in a large urbanized area (Google Earth, 2006). In contrast, the population for a seven kilometer radius from the center of Sikalongo is 2880, and the population for a seven kilometer radius from the center of Batoka is 3337 (Falling Rain Genomics Inc., 2004). Not surprisingly, the population number for Mboole could not be located, due to its small size. Therefore, Sikalongo Basic School, Batoka Basic School and Mboole Basic School are designated as rural schools. These two clarifications of terms will provide for a more comprehensive understanding of in-service teacher training in Choma District.

A third definitional clarification relates to the use of the word "in-service". Western schools often have in-service days in which all the teachers attend

meetings located at the school site. School principals review policies, curriculum directors explain new book series, speakers give motivational talks and some time is often given for individual teachers to have meetings or work in their rooms. The term in-service in Zambia assumes a meeting that is held at one school, with only very few teacher representatives from other schools attending the meeting, in addition to the headmasters. The difference in meaning encompasses two distinctions: 1) the in-service meeting or training is only for teacher representatives and not the entire body of teachers at a particular school; and 2) the meeting or training is held at only one centrally-located school. Therefore, the majority of teachers do not participate in the in-service meeting or training. Because this distinction between the meanings of this term only became clear to me during field research, the usage of the term in-service throughout the duration of this research implies training that takes place on site at each school and is available for attendance by all teachers at each school.

Historical Perspective

An adequate comprehension of the overwhelming odds Zambians face in providing education for all children cannot be realized without some historical background of the country. While the following section is not meant to be exhaustive, it does provide more than a mere glimpse into Zambia's past. Because the complexity of its history, with its long period of control by Great Britain, is fundamental to an understanding of its current day status, a more detailed historical perspective is both helpful and warranted.

The British were the dominant influence in Zambia prior to the attainment of independence by Zambia in 1964. During the years 1890 to 1911, Zambia was divided into two parts, the east and the west, which were known as Eastern Rhodesia and North Western Rhodesia (Mukoboto, 1978). The first Europeans to enter these territories were Portuguese, but their activities were insignificant (Turok, 1989/1999). It was the reports written by David Livingstone, who originally came to South Africa as a doctor with the London Missionary Society, which encouraged European interest in Eastern and North Western Rhodesia. Livingstone was motivated by a strong desire to promote missionary work and, although he actually never founded a permanent mission station, he did have a great influence in directing mission societies to Central Africa. At his suggestion, both the London Missionary Society and the Church of Scotland Mission Society sent missionaries to these territories prior to 1890 (Henkel, 1989/1999). Before the turn of the century these two mission societies had started eight new stations of work, and four new mission societies had arrived in Eastern and North Western Rhodesia. Mission societies immediately began the arduous task of opening schools for children in the surrounding villages. Early mission schools were primarily regarded as a means to win converts and to increase the membership in their Christian congregations (Küster, 1999). Reading was taught so the African students could read the Bible, and education was considered a means to an end rather than an end in itself.

During this same time period, Cecil Rhodes was making a fortune in diamond mining in South Africa. He wanted to extend his hold over the regions to the north and in 1889 he founded the British South Africa Company in an effort to forestall the possible annexation of the territory by other European countries. He obtained a royal charter from the British government which bestowed the powers of government to the British South Africa Company, and the company took possession of North Western Rhodesia in 1897 and soon incorporated Eastern Rhodesia under its power (Turok, 1989/1999). In 1911, on behalf of the British government, the Company merged the two territories into Northern Rhodesia, and continued to rule the region until the territory was transferred to the Colonial Office in 1924. This period, from 1911 until 1924, brought significant changes for African society. A railway was completed in 1909 connecting South Africa to copper mines in Katanga, Zaire, north of Northern Rhodesia, and large “hut taxes” were imposed by the British South Africa Company to finance this project. These taxes, due in cash, made it necessary for African men to leave their villages and work as laborers in the diamond mines of South Africa (Küster, 1999). Although income to the British South Africa Company from African taxes rose from £6,000 in 1902 to £72,000 in 1914, this amount was insufficient to cover the cost of administration, and the Company encouraged the settlement of white immigrants to develop the territory and raise the tax base (Turok, 1989/1999). Thus, the European population grew from 1,497 in 1911 to 3,624 in 1921, with most of the immigrants settling near

the railway. The British South Africa Company's prime interest during these years was twofold: 1) to keep administrative costs to a minimum and use the territory's African population as a source of cheap labor for local farms, which were owned and managed by white settlers, and 2) to maintain control of the diamond mines of South Africa and Zimbabwe (Küster, 1999). The official policies of the Company did not provide any incentive for the establishment of a local social infrastructure, including schools, and the development of an educated African workforce was considered irrelevant to the British South Africa Company's leaders. The entire economy of Northern Rhodesia during these years was geared towards mining and the interests of the settlers (Kelly, 1999).

The educational development in Northern Rhodesia under the rule of the British South African Company was entirely established and maintained by the mission societies. Schools were seen as an integral part of mission work, since the missionaries placed their main hope for unwavering converts to Christianity on the young people of the villages (Kelly, 1999). As in the period prior to British South Africa Company rule, the mission schools were motivated to teach reading so people could read the Bible and spread the gospel message to others. Some of the mission schools also wanted to teach carpentry, blacksmithing and other skills that would help Africans raise their living standards. At first, local people showed little interest in school, but this slowly changed with the realization that an education increased the possibility of obtaining paid employment and thus augmented the ability to pay their hut taxes (Kelly, 1999).

Changes in the socio-economic climate of Northern Rhodesia, which were the effect of more education, became apparent within the culture. Education of young men enabled them to obtain salaried employment and subsequently pay the required bride wealth demanded by their brides' families, instead of working for their future in-laws' families as payment for their brides, which could take years to complete. School attendance therefore enabled young men to "circumvent certain long-standing social practices" (Küster, 1999, p. 258). Girls also benefited during this timeframe as education slowly became available for them. The London Missionary Society established a girls' boarding school in Mbereshi in 1915 and by the year 1925, five additional girls' schools were established by various mission societies, due to the success of the school in Mbereshi (Department of African Education, 1952/1999).

There was an ever increasing demand for educational facilities by the African communities during the time period 1890 - 1925, and mission societies asked the British South Africa Company for financial assistance. Except for one school, the Barotse National School which was founded in 1907 in accordance with an agreement between the British South Africa Company and Chief Lewanika (which gave the Company exploration rights throughout North Western Rhodesia in exchange for an annual sum of £2,000 and the establishment of a school), no other schools in Northern Rhodesia received financial assistance from public funds before 1925 (Department of African Education, 1952/1999). The mission societies met in 1914 for the first General Missionary Conference held in

the territory and discussed the African population's growing desire for more schools. They passed a resolution urging the British South Africa Company to subsidize all approved primary schools in Northern Rhodesia (Küster, 1999). The Company's reaction to the resolution was to inform the mission societies that no action would be taken because administrative costs were already much higher than tax revenues and their shareholders were not in favor of losing even more money by subsidizing African education. Küster (1999) notes that the mission societies repeated their requests for financial assistance at successive conferences in 1919 and 1922, but no funds were forthcoming. In 1918 the British South Africa Company passed the Native Schools Proclamation, which stipulated that a school could be closed if the government found it to be detrimental to the existing ruling order of the village. The administration was given the right to require a certificate of efficiency and good conduct from the teachers, who had to prove that they were married and were living with their wives in the villages where they taught. Teachers could be removed by the administration if they were found guilty of subversion, misconduct, or interfering with a government official. Additionally, missionaries were ordered to inspect schools at least four times a year (Küster, 1999).

The British South Africa Company's attempt to control the schools, to which it contributed nothing, provoked very strong reactions from the missionaries. One Livingstonia missionary from Chitambo wrote that "the general impression one receives is that missionaries, instead of being looked upon

as fellow workers, are regarded as potential criminals” (Küster, 1999, p. 238). The mission societies continued their demands for government funding, arguing that the additional supervisory work could not be accomplished without some financial responsibility taken by the British South Africa Company. Although financial help never materialized, the strong missionary resistance led to the repeal of the Native Schools Proclamation (Kelly, 1999). The number of schools and students continued to rise rapidly during British South Africa rule. By 1924, the year their rule ended, an estimated 100,000 African children were attending 1,977 schools (Küster, 1999). This educational expansion was due to the active pursuit of formal schooling on the part of the African population, in spite of a lack of governmental support of an educational infrastructure. One example of African diligence is the Dutch Reformed Church schools in the eastern part of the territory, which were built and financed by African villagers, who also contributed to their teachers’ salaries and provided housing and food for them (Küster, 1999).

Although the British South Africa Company enabled Europeans to settle in the territory, there was some friction between both parties. The European population had grown and the Company, being in debt, planned to impose a tax on their income (Turok, 1989/1999). The British South Africa Company also planned to merge the territory of Northern Rhodesia with Southern Rhodesia in order to cut administrative costs. However, the settlers in Northern Rhodesia preferred a transfer of power to the British government, and since the region had

failed to produce adequate revenue for the British South Africa Company, negotiations began for such a transfer. Turok (1989/1999) notes that true to its character, in the transfer agreement with the British government, the Company retained monopoly over mineral rights in the territory in perpetuity. In 1924, Northern Rhodesia became a British Protectorate and a Crown Colony.

The following year a Sub-Department of Native Education was created within the Department of Native Affairs of the London Colonial Office (Küster, 1999). This was the direct result of increased pressure from the mission societies for substantial educational grants for their schools, and the rising African demand for more schools. The change of administration and the visit of the Phelps-Stokes Commission to the territory gave new impetus to their efforts. The London Colonial Office set guidelines for African education in all British colonies in tropical Africa, resulting in the Advisory Committee on Native Education in British Tropical Africa requesting the Phelps-Stokes Foundation to send a commission to East Africa in 1924 (Kelly, 1999). The Phelps-Stokes Commission met with the General Missionary Conference in June, 1924, and recommended an adaptive educational program for Africans based on the Commission's perception of educational provision for Negroes in the United States. The commission's concern was that education should prepare students for life in the rural village community, and it recommended a simple, utilitarian form of education rooted in agriculture with little academic content (Kelly, 1999). Mukoboto (1978) discusses the various meanings of this adaptive educational

program: to the Phelps-Stokes Commission it implied education similar to Negroes in the southern part of the United States; to the white settlers in Northern Rhodesia it was a way to keep Africans in an inferior position; to the missionaries it was a way of saving Africans from their sins and ignorance; and to the British politicians it was a form of paternalism whereby white masters could guide the Africans. “Most of the anthropologists who were writing on Africa then had never bothered to find out about the systems they were studying from another point of view” (Mukoboto, 1978, p. 4). He continues “this approach to African education indicates that adaptation was to copy the western culture...African culture was condemned before it was understood. The education to be introduced was to be individualistic in nature, which was a foreign element in African culture” (Mukoboto, 1978, p. 10).

During the years 1925 to 1945, policy statements from Colonial Office were almost entirely devoted to primary education. There were no coherent, directive policies on the development of secondary education (Kelly, 1999). The overarching philosophy guiding all educational policy during this time period was that “...nothing should be done that would threaten European dominance” (Kelly, 1999, p. 39). By only providing rudimentary education, the government ensured that the African population was prepared to work in the field or in unskilled jobs in the wage economy. Africans were not able to compete with Europeans for high level jobs, thus protecting the economic position of the settlers (Carmody, 2004). To guarantee this protection of the settlers’ positions within the economic structure of

Northern Rhodesia, the British adopted a theory of indirect rule which was used in other parts of Africa during this time period (Mukoboto, 1978). The Africans were ruled through their chiefs, who were subordinated to and dependent upon the British government. By instituting policies through the chiefs, the Colonial Office intentionally tried to avoid the problems they had previously faced in India, where "...the British had trained too many intellectuals who gave them problems because they became politically minded. From this Indian experience, it was argued by the British that the inevitable results of intellectual education was the undermining of respect for authority" (Mukoboto, 1978, p. 21).

The mission schools continued to dominate the provision for education in Northern Rhodesia. By 1935 there were 1,990 mission schools and by 1945 there were 2,034 mission schools. In contrast, the Government and Local Education Authorities had 12 schools in 1935 and 51 schools in 1945 (Kelly, 1999). The concentration of provisional education was on primary schools and the teachers were poorly educated, poorly trained and poorly paid. In addition, minimal financial support was given to the establishment of new schools or the support of existing mission schools; the taxation of the Northern Rhodesians between 1930 and 1940 produced £24 million for the ruling authorities and only £136,000 of that amount was given to the schools through developmental grants (Turok, 1989/1999). Until 1939, more money per year was spent on educating 1,248 European children than was spent on over 92,000 African children (Kelly, 1999). Educational provision by the governing power was minimal and the prospects

were bleak for African students during these years, particularly for those students desiring secondary education. By 1945, there were only 65 African students attending secondary courses and the Mulani Training Center was the only school in the colony which provided four years of post-primary education (Küster, 1999).

The need for better trained upper primary teachers provided the impetus for the initial provision of secondary education for Africans. Not surprisingly, a British historian writes that the decision to institute secondary schools came from the Colonial Office rather than from the local administration. He noted African demand for secondary education was relatively small and of little effect in the determination of policy (Coombe, 1968/1999). In contrast, Küster (1999) states continuing African pressure for the provision of a more advanced level of schooling became more forceful and eventually the Advisory Committee on Education compelled the colonial government to abandon its excuse-and-delay tactics and agree to the extension of a capital grant towards the building of the Protectorate's first secondary schools for Africans, which opened in the 1940s.

The determination displayed by African town dwellers to gain access to schooling is reflected in a statement made by the missionary J. Soulsby in 1936 who remarked: In Mufulira a school had been opened in our Mission Hall and two inexperienced teachers were struggling with 85 scholars in the morning, 76 in the afternoon and an adult class in the evening at which 135 men sat around three blackboards or struggled to spell out Bemba syllables from printed sheets. The school simply had to be opened because the children and men in their quest for knowledge would not be denied and began organizing themselves. (Küster, 1999, p. 243)

The development of secondary schools was not initiated by the Colonial Office in London until after World War II (Henkel, 1989/1999). Progress was slow and by 1960 there were sixteen mission secondary schools and only eight secondary schools run by the government and two schools operated by the mining companies. “As a whole, the system of secondary schools was only slowly and belatedly developed in Northern Rhodesia” (Henkel, 1989/1999, p.126). The establishment of secondary education for girls was very delayed for two main reasons: 1) mission schools gave priority to boys since they were expected to be pastors, catechists and teachers in the mission schools; and 2) African mothers valued their daughters being at home and helping with the traditional domestic chores (Mukoboto, 1978). In 1946, three girls, a mere 2% of the total student population, enrolled in Form 1 (Grade 8). However, the number of enrolled female secondary students increased rapidly to 387 by 1960 and 1,379 girls by 1963 (Sanyal, Caes, Dow, & Jackman, 1976/1999). Despite these efforts, the territory’s overall educational provision was poor and the neglect of education was a continuing symptom of colonial determination to keep avenues of educational advancement closed to all but white settlers.

Between 1945 and the years immediately prior to independence in 1964, the colonial government’s emphasis on rural primary education and the training of African students in lower levels of agricultural skills continued (Küster, 1999). The Education Department’s Annual Report in 1948 stated it is extremely

important that the practical side of education be emphasized and any false notions that manual labor is incompatible with education be eradicated. Furthermore, the report states that “Africans have constantly to be reminded that there has been far too much contempt for manual labor, with a contrasting admiration for book-learning and pen-driving... The educational policy of this country is to provide education of a practical type” (Küster, 1999, p. 317). To implement this plan, a third year was added to the upper primary schools which was devoted to practical training in agriculture or industrial crafts, such as building or woodworking, and candidates for Standard Six examinations were graded by their teachers on their ability and eagerness to perform manual work. This policy remained in force until the late 1950s (Kuster, 1999). During this same time period, the Colonial Office passed a series of legislative policies that restricted African accessibility to market areas to sell their maize and produce. The creation of “Native Reserves” and the subsequent removal of 60,000 Africans from the most fertile land near the established markets and the railway system severely restricted even the most industrious farmers. One African asked “What is our good trying to improve or increase the produce of our gardens? Transport is so expensive that it does not pay to send anything to Livingstone for sale” (Küster, 1999, p. 319).

The African response to these continued restrictions was to help shape the nature of their schooling by forcefully articulating their educational preferences. African students viewed their English education as a ticket to jobs with higher salaries. Mission societies were often compelled to react to the pressure from

African students by adapting their curricula to include the teaching of more English and literary skills. The mission schools often capitulated to these requests because their desire was to attract large numbers of religious converts. However, many of the mission schools found themselves in a position where their primary goal of evangelism was being undermined by economic motives rather than religious interest from African students (Kuster, 1999). Africans would switch their mission affiliation in order to gain the kind of education they wanted and those mission schools which refused to teach English or advanced literary subjects witnessed their students transfer to other mission schools where the subjects taught were closer to their educational ambitions. Nevertheless, the lack of adequate educational opportunities created a growing unrest in the Northern Rhodesian African population which could not be abated.

The years from 1948 to 1953 saw more interaction between politics and education than in previous years. Despite strong opposition by the African population to a closer union with the Southern Rhodesian settler state and, consequently, white rule, the Federation of Rhodesia and Nyasaland was established in October, 1953, which united Northern Rhodesia, Southern Rhodesia, and Nyasaland (known as Malawi today). This was the beginning of serious discussion about independence for the territory previously known as Northern Rhodesia and the nationalist movement's fight against the creation of the Federation was replaced by the struggle for full political emancipation (Kuster, 1999). Soon after the imposition of Federation, a new political

organization called the Zambia African National Congress was formed, led by Simon Kapwepwe and Kenneth Kaunda, which quickly gained support in the rural areas. In 1959, the Federation declared the Congress illegal and arrested its leaders (Turok, 1989/1999). During the ensuing protests and violence, schools became the stages for political unrest and teachers all over the territory became involved in nationalist politics and encouraged student activities. A student, reflecting on his years at a school in Chikuni during the late 1950s, said:

I remember during classes they proved what they proved all over the world teaching about revolution. Even when they were teaching us about the French Revolution, there was a tendency to bring it back to this country. We knew that they could not say openly: 'Do it.' They were planting seeds of revolution in us. It was dangerous for them to come out in the open. ... They helped us to analyze the situation and look beyond what was in the book. (Küster, 1999, p. 282)

The issue of education ranked high on the list of priorities articulated by the nationalist movement, and the struggle for educational improvement constituted a significant step on the path towards independence.

The Zambia African National Congress emerged under the new name of United National Independence Party in 1960, and Kenneth Kaunda became its leader (Turok, 1989/1999). Opposition to Federation in Northern Rhodesia was widespread and following various attempts at compromise solutions, the Federal structure was finally dismantled in 1963. Within a matter of weeks the United National Independence Party swept the polls in the first ever "one-man one-vote" election in that territory. Independence negotiations occurred during April and

May, 1964, and the Republic of Zambia became independent on 24th October, 1964 (Turok, 1989/1999).

The educational situation in Zambia at independence was deplorable. In 1964, 75 % of men and 93 % of women in Zambia had not completed the first four years of schooling (Küster, 1999). Only 1,200 Zambians had a secondary school diploma, a number which had been reached in other British colonial countries much earlier - Ghana in 1943, Uganda in 1955, Kenya in 1957, and Tanganyika in 1960 (Henkel, 1989/1999). The white settler domination of both Northern Rhodesia, and later the Federation, took its toll on the educational provision for the Zambian population. Adequate financial and personnel resources were never allocated to Northern Rhodesia to expand secondary schools. Amazingly, the number of university graduates in Zambia at the time of independence was a mere 961 university graduates and all of them had obtained their degrees outside the country (Küster, 1999). There was no university in the country in 1964, and of the 7,200 teachers in all Zambian educational institutions only 600 had completed secondary school, with only 150 of the primary school teachers holding a secondary degree certificate (Kelly, 1999). There were 623,000 children in the age range of 7-14 years in Zambia, of whom only 350,000 were in primary schools, with 270,000 in the lowest four classes. There was enormous demand immediately following independence for more educational opportunities and tremendous pressure to expand the educational facilities of the country. "A crisis of expectations was imminent as people expected immediate

delivery of more education on the attainment of independence” (Kelly, 1999, p. 82).

At independence, Zambia’s population was growing very rapidly; in 1962 the population of Zambia was 2.5 million and by 1980 it had doubled to 5.66 million (Achola, 1990). The dearth of educated nationals was one of the glaring problems facing Kenneth Kaunda as Zambia’s first president in 1964. “Zambia embarked on her independence with crippling shortages of educated people capable of moving into positions of responsibility” (Snelson, 1993, p. 172). In an effort to improve provision of education, Kaunda and the new political leadership listed its educational priorities as: 1) the elimination of racial segregation; 2) increased enrollments for Zambians at secondary and higher education levels; 3) the introduction of mathematics and science-oriented curricula; and 4) the provision of resources for the University of Zambia to enroll over 1600 students by 1970 (Achola, 1990). However, the implementation of these priorities was severely hampered by the scarcity of skilled and educated manpower, extreme dependence on expatriates, prejudices against technical education, and a surplus of unskilled labor (Kelly, 1999). In an early speech as President, Kaunda set the tone for the new government’s concern for educational provision. “Government spending on schools and teachers’ houses was only a little over one and a half million pounds last year. In 1965 we intend to spend six million pounds” (Hatch, 1976, p. 207).

Given the neglect of educational opportunities for Zambians prior to independence, it is hardly surprising that the First National Development Plan of 1966/70 of the United National Independence Party stressed increased enrollments in both primary and secondary schools to create more indigenous manpower for the expansion of the economy. Enrollment of students continued to increase with 378,417 students enrolled in primary classes in 1964 and 1,260,564 students attending primary schools in 1984. In addition, secondary school records show 13,853 students enrolled in secondary education in 1964 with this number increasing to 125,811 secondary students attending school in 1984 (Achola, 1990).

It became necessary to recruit qualified teachers from outside Zambia, including many from overseas countries. The Ministry of Education relied on expatriates to teach in secondary schools, and 90 per cent of all secondary teachers were non-Zambian in 1969 (Stannard, 1970). Snelson (1993) observed that it would be many years before Zambia could produce enough of its own secondary teachers to staff all the schools.

Despite the increase of secondary students, considerable complaints were registered by government leaders regarding the insufficient number of secondary school graduates capable of entering professions requiring a mathematical or scientific background. Engineers, physicians, agronomists, and accountants were desperately needed in the economic structure and these professions all required certain knowledge of science or mathematics. The Office of the Vice-President

acknowledged the inadequacy of secondary students' preparation in mathematics and science as evidenced by the following numbers: out of 1,834 secondary school students entered for the Cambridge Overseas School Certificate in 1968, nearly 1,100 did not sit for the mathematics examination or failed it outright, and only about 400 received passing grades (Office of the Vice-President, 1969).

In 1972, The Second National Development Plan 1972/76 was released by the government. This plan continued previous emphasis on accelerated enrollments to furnish manpower required by the economy in the early stages of Zambia's independence. But by the end of 1975 the nation's leaders felt that attempts of the previous 10 years at educational expansion had merely exacerbated existing problems: declining quality of education in the face of massive enrollments; greater demand for new schools which were no longer affordable; high dropout rates at the end of primary school because of limited spaces at the secondary level; and lack of adequate teacher recruitment and training to meet national requirements (Achola, 1990). A new government endeavor, The Educational Reform: Proposals and Recommendations of 1977, provided for a full-scale assessment of the entire educational system. This Educational Reform used the term "universal basic education" to refer to attainment of nine years of school for everyone in the nation. This became the goal of the reform measures; however, it was soon realized that this ambition could only be accomplished over time. In the interim, emphasis was placed on the provision of sufficient places to enable every 7-year-old child to enroll in

Grade 1 and continue through Grade 7. This Reform Act stressed both quantitative expansion and qualitative improvement of *Zambian* education. High priority was given to the development of well-trained teachers, with reform proposals calling for the expansion of secondary teacher colleges and the construction of a new training college (Achola, 1990).

Because of the severe shortage of qualified teachers, as well as secondary school buildings, many primary students dropped out of school after several years. The term used to describe these students is “school leavers” (Mwanakatwe, 1968). The highest dropout occurred after Grade 7, with only one-third of Grade 7 students able to secure a place in Form I (Grade 8). In a statement in the *Zambian National Assembly*, the Minister of Education tried to clarify government policy for Form I selection and to allay the anxieties of parents whose children had not been successful. He noted that approximately 41,000 Grade 7 school leavers had applied for admission to secondary schools in 1968. There were only 14,000 available places in Form I classes, which was a 35 per cent progression rate. He continued his speech with the following statement:

We are having to put into our secondary schools this year 35 per cent of primary school leavers. In Uganda, they can only afford 10 per cent, in Tanzania they have only got 13 per cent and I gather that in Kenya and Rhodesia the percentage is 20, so that in comparison with other countries, Zambia is now in a position to claim that we put more of our population of primary school leavers into secondary schools than any other country on the continent of Africa. (Mwanakatwe, 1968, p. 72)

This was small comfort for anxious parents wanting a better life for their children, which was perceived to be accomplished through more education. In fact, few school leavers could obtain jobs and these children swelled the ranks of unemployed people. Zambians were very concerned about this problem and pressured the government to take action; a new development plan was therefore instituted. The Third National Development Plan 1979/83 was intended to implement aspects of the Educational Reform recommendations made in 1977. The following issues were addressed: 1) improvement of quality of education and teacher education; 2) simple, durable new school buildings with low maintenance costs and use of local construction materials; 3) recurrent and capital expenditure on education avoiding waste; and 4) development of new curricula accommodating necessary educational reforms.

It soon became apparent, however, that the expansion of educational opportunities was more in quantitative than qualitative terms. Due to the rapid expansion, high pupil-teacher ratios existed, shortages of teaching materials were common, and inadequate teacher-training programs resulted in poor classroom performance (Ishumi, 1994). In response to these growing educational problems, yet another study was commissioned by the Ministry of General Education and Culture in 1984/85 to formulate concrete proposals for the implementation of the recommendations of the 1977 Educational Reforms. Because of increasing financial strain on the economy and continued population expansion, this study concluded that realization of Universal Basic Education, the term first used in the

1977 Reform Recommendations, would remain elusive for a long time, but that Universal Primary Education might be attained by 1995 (Achola, 1990).

The continual inability to attain unrealistic goals set by these commissions and study teams was very disheartening to the educational leaders of the nation. One of the main reasons for breakdown of the Reform Recommendations and The National Development Plans was that they were too ambitious. Time and again the plans exceeded financial, material, and human resources and insufficient attention was given to economic, demographic, and logistic factors. Additionally, the capacity of the education ministry to execute the plans and reformations was continually overstretched. Intentions of the education ministry were laudable, but engaging adequate resources was impossible (Kelly, 1999).

In tandem with increased enrollment of primary and secondary school students during the late 1960s and early 1970s, the University of Zambia was established. In 1965 Parliament passed The University of Zambia Act, formalizing the first national university in the country, which opened its doors to students in July of 1966 (Achola, 1990). Kaunda strongly believed if Zambia was to become independent in its conduct of social and economic affairs, it needed a program to train its own citizens. The University of Zambia was his vision for preparing Zambians to take responsible jobs in the most critical sectors of the nation. Conventional academics, however, soon gained control over the new institution and, instead of concentrating on agriculture, mining, and

administration as Kaunda had envisioned, the university was soon filled with aspiring politicians and diplomats (Hatch, 1976).

Although the new university had a prestigious image in the country, it also had its troubles during these years. Between 1971 and 1984 there were four major episodes of militant student opposition at the University of Zambia. The issues ranged from opposition to the United National Independence Party's foreign policies to poor food in the cafeteria. The students were also concerned about rising corruption making government inefficient and depleting the nation's resources. The students enthusiastically voiced their criticisms of foreign, domestic, and university policies, and the student union refused to affiliate with the United National Independence Party, which angered the party. Although university administrators might have been able to negotiate amicable settlements, government officials were unwilling to tolerate criticism from the university students and often took harsh actions against the students (Burdette, 1988). These confrontations resulted in closures of the university, the blanket dismissal of the students, and sometimes the expulsion of foreign lecturers for "fomenting rebellion" (Burdette, 1988, p. 130). These major disturbances led to governmental closures of the university for a total of 400 days within a ten year period, which resulted in a loss of trust and international credibility (Kelly, 1999).

Finances have also been a problem with the University of Zambia. The proportion of funds used by the teaching school declined from year to year, from 39.2 % in 1974 to 29.9 % in 1984. At the same time, the proportion of funds used

for administration and support services grew from 29.4 % in 1974 to 38.6 % in 1984 (Kelly, 1991). There was also a large number of non-teaching and non-research staff, with the university averaging three staff for every two full-time students. The ancillary staff salaries absorbed a considerable proportion of the university's budget. From 1979 to 1984 the non-teaching staff grew at an annual rate of 3.7 per cent, the teaching staff at 3.4 %, and the number of full-time students increased by only 1.4 %. It is significant that the number of auxiliary staff was allowed to grow so rapidly when restraints were being experienced in the economy and when the university could not even supply the teaching schools with necessary materials (Kelly, 1991).

The copper production of the northern region sustained the economic needs of the country for years until the mid-1970s when copper prices began to fall. Planning for the future of the country could not be based on the assumption that the copper price would remain stable, but unfortunately most of the government leaders assumed this was possible (Hall, 1969). Hall predicted the price of copper would fall within the next decade "if all previous cycles in the metal markets have any meaning. When it does, Zambia will suddenly find itself short of money and unable to live in the manner to which it has grown accustomed" (Hall, 1969, p. 249). Unfortunately, most government leaders at the beginning of the 1970s did not heed these predictions.

The economic outlook of the mid 1970s began to decline significantly. Inflationary pressures from both domestic and international forces contributed to

Zambia's economic troubles. The colossal foreign debt of U.S. \$7.2 billion with its high interest rates exerted strain on the economy in the 1980s and the gross domestic product per capita average annual growth rate from 1960 to 1990 was -1.2 % (UNICEF, 2005). A significant result of this economic crisis was a conspicuous shift in national spending away from education to other governmental sectors. Much of the country's budget was spent on a growing bureaucracy and the military (Ishumi, 1994). Education accounted for 20 % of government expenditure, but capital costs of the school building program remained high, recurring costs of the expanded education system were massive and expenses greatly exceeded the budget. With increasing needs in other government agencies, education could not expect to maintain this generous budget item (Snelson, 1993). In fact, budgetary allocation for education dropped to 2.4 per cent of the gross domestic product in 1990 (United Nations Development Programme, 2003). This drastic budget cut resulted in an educational system unable to produce the necessary labor force with the knowledge and skills needed for effective economic development (Lungwangwa, 1999).

Another contributing factor to Zambia's economic downturn was the establishment of an upper class society. Prior to independence, the majority of wealthy people were Europeans. During the campaigns against colonial government, the people had been led to believe that self-rule would bring instant material improvements. With the example of European life-styles clearly visible,

Zambians desired and expected immediate benefits from their new independent status. Hatch (1976) states inefficient bureaucracy devoured much of government spending; from 1964 to 1968 government expenditure rose by 20 % a year with four-fifths of the 20 % spent on civil service salaries. Bureaucracy abounded and ministers and cabinet officers were needed to fill these bureaucratic roles, with their salaries comprising a disproportionate share of the nation's budget.

The Fourth National Development Plan 1989/93 stated the government attached great importance to education because it played a central role as a source of educated manpower needed in all areas. However, the educational picture in Zambia continued to be bleak and disheartening; it survived during the weak economy in the 1980s and 1990s due to reliance on the flow of aid in the form of loans, grants, and technical assistance. The World Bank and United Nations were the largest contributors of aid to education, with Belgium, Canada, Denmark, France, Ireland, Japan and the USSR being called "donors of importance" in the education field (Kelly, 1991). Most of the aid was spent on educational personnel, with 59.5 per cent of the 1985 staffing budget paid by foreign aid. During the Kaunda years foreign aid increased significantly and the debt situation became "a very powerful undertow" (Burdette, 1988, p.169).

Kaunda firmly believed that the one-party political system of Zambia ensured stability in the country and to permit other political parties would divide the people along tribal lines. However, this view was not shared by many Zambians. It was not until the late 1980s, when economic collapse seemed

inevitable and people could not see any hope of improvement as long as Kaunda and the United National Independence Party remained in power that a bold opposition emerged (Snelson, 1993). In response to mounting criticism, Kaunda agreed to end the one-party system and hold national elections at the end of 1991. He remained confident that he and his party would win when the people voted, and he was utterly shattered when Frederick Chiluba, a trade union official, was swept into power as the new president (Snelson, 1993). The new Movement for Multi-Party Democracy won an overwhelming victory in the contest for seats in the National Assembly and the United National Independence Party lost its power. “It is to Zambia’s great credit that the change from a single-party government to a multi-party democracy took place in orderly fashion after an election judged by international observers to have been free and fair” (Snelson 1993, p. 324).

By the end of Kaunda’s presidency, educational opportunities had declined significantly. Increased enrollments had a negative effect on teachers who dealt with very high student-teacher ratios. Teacher burn-out was high, particularly for those teachers doing double or triple class sessions per day. There were few textbooks and no teacher handbooks (Sikwibele, 1991). An analysis of government expenditure on educational materials revealed very large reductions; whereas in 1970, Kwacha 4.33 million was allocated for materials such as textbooks, paper, chalk, and teachers’ guides, in 1986 the budget for these items was slashed to zero. At the secondary level, the budget decline for materials went

from Kwacha 5.4 million in 1970 to nothing in 1986 (Sikwibele, 1991). The government's solution to this problem was to increase the financial responsibility of the parents. They were now required to pay for textbooks, in addition to uniforms, transportation fees, school building fund, examination fees, and necessary boarding fees. Parental expenses per primary school pupil now surpassed allocations by the government (Sikwibele, 1991). For many children, particularly in the rural areas, primary school had become an impossible option due to increased fee expectations.

Chiluba's new government inherited the deplorable state of the prevailing educational system and needed to make significant changes. In an effort to improve educational provision, President Chiluba and his Ministry of Education organized a National Conference on Education for All in 1992, which included participants from a wide spectrum of Zambian society: politicians, academicians, teachers, church representatives, labor leaders, and donor-agency representatives. The reports from this conference prompted the government to write new proposals and strategies in a document called *Focus on Learning: Strategies for the Development of School Education in Zambia* (Ministry of Education, 1992).

Acknowledged as the official policy on education, *Focus on Learning* was committed to the provision of seven years of primary education for every child of primary school age in Zambia, with the hope that completion of these years of education would help alleviate poverty and ignorance, and would promote economic and social development (Manchishi, 2004). The principle method of

funding this objective was to increase the proportion of public funds devoted to the education sector. The Ministry of Education made it very clear that political commitment must be given to these priorities:

But if resolute, generous and imaginative steps are not taken now to provide every child with good quality primary education, the problem will grow altogether too large to deal with in later years, given the rapid increase of the child population. Zambia's economic future will be determined in large part by the capacity of her people to acquire, adapt and advance knowledge, a capacity which depends very largely on the extent to which children attain the literacy, numeracy, communications and problem solving skills that should be promoted in primary schools. Investment in these schools provides the basis for subsequent healthy economic development. Neglect of the primary schools will condemn the country to continued developmental starvation and economic malnutrition. (Ministry of Education, 1992, p. 5)

M. J. Kelly, a prolific writer and prominent authority on education in Zambia, explained that in a situation where resources are insufficient to meet existing needs, the task must be to reduce the scale of the needs so they fit the resources. He implored educational leaders to work together to determine what could be accomplished with existing resources to bring basic education to all Zambian children (Kelly, 1991/1999). The wisdom of Kelly, an erudite professor associated with The University of Zambia for many years, was worthy of serious attention.

Four years later, in 1996, a new policy paper was issued by the Ministry of Education called *Educating Our Future*, which still remains the current educational policy of Zambia. This policy's objective is "...education in Zambia is intended to serve individual, social and economic well-being and to enhance

the quality of life for all. This aim will be guided by the principles of liberalization, decentralization, equality, equity, partnership, and accountability” (Ministry of Education, 1996, p. 3). This policy stresses the importance of these six principles of education to enhance the well-being of all Zambians.

The first principle is liberalization of educational provision, which entails fundamental changes in matters of power and control of schools. This new policy provides for the right of private organizations, individuals, religious bodies, and local communities to establish and control their own schools. The Ministry of Education characterizes liberalization as protecting the right of parents to send their children to educational institutions of their choice, whether they are public, private, religious or communal (Ministry of Education, 1996). It also allows for mission agencies to regain control of primary schools they had instituted and subsequently relinquished to the central government during the 1960s and 1970s (Kelly, 1999).

The second principle, decentralization, promotes “broad-based participation in the management of education with great emphasis placed on the creativity, innovation and imagination of local-level education managers” (Ministry of Education, 1996, p. 127). By involving local people in the decision making process, they would assume more responsibility for education in their area, develop a sense of local ownership and management and eliminate many bureaucratic procedures that impede efficiency. This process of decentralization is being accomplished by establishing Education Boards at local school levels,

with administrative responsibility for planning and implementing programs being transferred to these local boards, as well as legal and financial power (Manchishi, 2004).

Educating Our Future defines the related ideas of equality and equity, the third and fourth principles, as fairness and justice being available for everyone within the education system in order to enhance equity regardless of gender, physical, mental, social, or economic factors. Measures to promote equality and equity in education include allocating resources to those in greatest need, providing appropriate support systems, and the diversification of the curriculum to meet individual abilities, talents and interests of the students. Educational policies which promote a multifaceted development of people are encouraged by the government, so they can fully participate in the economic, cultural and social affairs of the society (Ministry of Education, 1996).

The current educational policy begins to encourage partnerships with various stake-holders in education, which is the fifth principle. This is viewed as a departure from the policy of the 1960s and 1970s when the government appeared to be hostile to partnerships; in this new policy, private and voluntary agencies, local communities and religious bodies are welcome to partner with the government in educational provision of both primary and secondary schools. The policy discusses grant-aided schools, which are schools outside the government system, in which the government pays salaries of teachers, gives a grant of 75 % of the capital costs of approved projects and an annual grant towards the cost of

running the schools. The grant-aided schools are almost completely autonomous, with power to establish management boards that have full responsibility for policies, staffing, admissions, and curriculum (Carmody, 2004). Several basic schools which are part of this study are grant-aided schools. Community partnership is also welcomed and encouraged; communities can participate in educational provision through construction of school buildings, management of schools, maintenance of classrooms and provision of school desks and chairs (Ministry of Education, 1996).

Accountability, the sixth principle, is briefly discussed in *Educating Our Future* with reference to the amount of money available for education being limited because there are many legitimate competing demands for resources in the country (Ministry of Education, 1996). The statement is made that to guarantee the best use of available resources and to allow for full public accountability, “the Government will ensure that effective systems are in place at national, provincial, district, and institutional levels for evaluating the effectiveness and efficiency with which resources are used” (Ministry of Education, 1996, p. 5).

Educating Our Future is the current educational policy of the Zambian government, and although it primarily focuses on the provision of education for children, it is also concerned about teacher training. It recognizes that the equality and effectiveness of an educational system depends on the quality of its teachers and that essential competencies required in every teacher are: 1) mastery of the material that is to be taught; and 2) skill in communicating that material to

pupils (Manchishi, 2004). The policy recommends an increase in the supply of teachers in order to provide seven years of education to all eligible children by the year 2005. Educating Our Future also proposed the establishment of a Teacher Accreditation Board but, according to Manchishi (2004), it is not yet operational.

Despite efforts to train teachers to become more effective in the classroom, drop-out rates among students remain high, especially in rural areas. In a 1999 study sponsored by the Institute of Development Studies, Sussex, England, and conducted by employees of the Ministry of Education, the main reason given for school leavers was lack of money to meet school costs. Due to the cost-sharing policy, parents must financially contribute to their children's education; however, this is impossible for many people because of unemployment and frequent drought. Distance from home to school, particularly in rural areas, was another significant reason for school leavers. Young children and girls were the most affected by long distances to schools and many dropped out soon after starting school (Kasonde-Ng'andu, Chilala, & Imutowana-Katukula, 1999). Another study using data from the Living Conditions Monitoring Survey, a nation-wide survey conducted by the Central Statistical Office, indicates 14 % of households listed their schools as 6-15 kilometers away. Each extra kilometer distance from a particular school decreased the attendance rate of children at that school by 1.5 % (Lungwangwa, 1999).

Girls are particularly vulnerable to dropping out of school. In rural Zambia, girls are expected to help with the family chores such as gathering fire

wood and carrying water several kilometers from the nearest well to their villages (Kasonde-Ng'andu et al., 1999). They are also at risk because many teenage girls become pregnant (Carmody, 2004). Interestingly, Mrs. Mwanawasa, as the current First Lady of Zambia, is becoming involved in the increasing problem of drop-out rates for girls. She founded The Maureen Mwanawasa Community Initiative, a non-governmental organization working closely with UNICEF, which emphasizes the need for the infrastructure to get water to all communities in Zambia (UNICEF, 2005, February 7). Because girls are traditionally responsible for collecting water for their villages from an area well, which is often many kilometers away, they miss the opportunity to attend school classes. In an interview in February, 2005, Mrs. Mwanawasa stressed the vital connection between water and education and asked for more donors to contribute to this worthy cause (UNICEF, 2005, February 7). This is particularly significant in light of traditional male dominance in Zambia; she is the first president's wife to become involved in social work in the country.

In addition to high drop-out rates, students in primary and secondary schools have limited materials to facilitate their learning. Conditions in schools are deplorable by Western standards. The Institute of Development Studies surveyed classroom furniture in Grade 6 classrooms throughout Zambia in 1997 (Kasonde-Ng'andu et al., 1999). The results show that only 88 % of Grade 6 children in Southern Province (where I am doing research) have sitting places and only 51 % have writing places within the classroom. Chalkboards exist in 74 %

of classrooms. Northern Province had the lowest percentages with only 67 % availability of sitting places and 32 % of writing spaces for students (Kasonde-Ng'andu et al., 1999). The Ministry of Education benchmarks for adequate student supplies in a classroom are for each student to have one notebook, one eraser and three pencils. However, another significant result from the same survey indicates that only 47% of all Zambian students have one notebook, 43% have an eraser, and 7% have three pencils (Kasonde-Ng'andu et al., 1999). The textbook-pupil ratio is well above the optimal ratio of one textbook for two pupils, with most schools experiencing a ratio of one textbook for five or six students (Seshamani, 2001). Fortunately, some of these statistics are outdated, since my recent field research revealed that all students had sitting places in the classrooms, although they were very crowded on benches connected to tables. However, textbooks are still being shared by many students, with as many as 15 students sharing one textbook in some of the classrooms.

In 2001, after he had already served two terms in office, President Chiluba requested the ruling party to change the republican constitution so he could serve a third term in office. Many Zambians protested this change and various sectors of society became concerned. The Catholic Church responded by issuing a public statement which was the first serious challenge to the proposed constitutional change and it had an enormous impact on the country (Zambia Episcopal Conference, 2001). The statement gave rise to a national mobilization against the third term and the Catholic Church was joined by the Law Association of Zambia

and the Non-Governmental Coordinating Committee to form the OASIS Forum (Komakoma, 2003). This forum mounted a nation-wide campaign that led to President Chiluba's decision to decline running for a third term. "This was a major victory to preserve Zambia's fledgling democracy" (Komakoma, 2003, p. 434).

The decision by President Chiluba to abandon the idea of a third term in office led to democratic elections and Levy Mwanawasa became the third president of Zambia. He took office in 2001 amid claims of much corruption in the previous Chiluba government. One Zambian journalist commented that Kaunda's men were pickpockets, but Chiluba's men were thieves (BBC News, 2001, December 19). Mwanawasa has also been maligned in the press for corruption and particularly for the teacher shortage crisis, which is purported to be a result of poor governmental fiscal management. In September, 2006, Mwanawasa was reelected as president of Zambia for a second term.

A key objective of the Mwanawasa government is attainment of the Millennium Development Goals in Zambia, which are part of the United Nations Millennium Declaration of 2000 (United Nations, 2005). Zambia was among many developing countries who committed to meeting the Millennium Development Goals by the year 2015. The Zambia National Submission to the Blair Commission for Africa commented that at present the achievement of reaching these goals remains a distant dream, with limited progress in some sectors and a reversal in other areas (Zambia National Submission, 2004).

Poverty and HIV/AIDS are two very significant issues with far-reaching ramifications for Zambia's ability to meet its commitment to the Millennium Development Goals.

Poverty is prevalent throughout Zambia, with 73 % of the country's estimated population of 11 million living below the poverty line (Bureau of Democracy, Human Rights, & Labor, 2004, February 25). Over the last four decades Zambia has experienced increasing poverty levels which have not declined despite the many forms of developmental assistance and the numerous financial loans the country has received. Zambia is still extremely poor and highly indebted. Between 1990 and 2000, Zambia spent almost 20 % of its Gross Domestic Product (GDP) on debt servicing, with only 2 % spent on health and 3 % on education. In 2003, Zambia spent US \$113 million on external debt servicing, US \$24 million on health costs and US \$33 million on education (Zambia National Submission, 2004). In 2004, Zambia's debt was US \$6.5 billion or \$670 for each Zambian person, which was one of the highest indebted countries in the world on a per capita basis. The percentage of debt owed to the World Bank and the International Money Fund (IMF) was 57 % and an additional 25 % was owed to governments of industrialized nations like the United Kingdom, United States, Japan, and Russia (Zambia National Submission, 2004). Clearly, debt service payments diverted funds from much needed educational provision.

In 1996, the World Bank and the International Monetary Fund launched the Heavily Indebted Poor Countries Initiative to create a framework for all creditors to provide debt relief to the world's poorest and most heavily indebted countries. In December 2000, Zambia reached the "decision point", when debt relief began on an interim basis following commitment by the World Bank and IMF. There was a long list of requirements accompanying the benefits of debt reduction, which included macroeconomic and structural reforms, poverty reduction, progress in the education sector and health sector, and progress in combating HIV/AIDS (Ellyne, 2002). Although many of the requirements were difficult to attain, government leaders struggled to meet the completion point, when creditors commit irrevocably to debt relief (World Bank, 2005, April 8).

After attainment of the decision point in 2000, some progress was made in the economic area with real gross domestic product growth averaging 4.6 % a year, a turnaround from the decline in per capita income that had prevailed over the previous two decades (World Bank, 2005, April 8). In the area of education, the government abolished tuition fees in 2002 and, consequently, the number of out-of-school children was cut in half and completion numbers of Grade 7 students increased (Global Campaign for Education, 2004). However, although parents do not pay tuition fees, their financial burden was not reduced since almost all schools simply raised the Parent Teacher Association charges to cover the lost fees (Seshamani, 2001).

One of the unfortunate by-products of the debt reduction plan was a freeze on hiring teachers in Zambia's education sector. Because of the need to meet budgetary restrictions imposed by the Heavily Indebted Poor Country Initiative, a ceiling on the public sector wage bill was instituted and 9,000 badly needed teachers were not hired by the government (Global Campaign for Education, 2004). A ban on any new hiring of teachers or health workers ensued; in addition, salaries of teachers and health workers were frozen. Because of the wage cap, Zambia was unable to replace teachers lost to HIV/AIDS and some rural schools had more than 100 students per teacher (Global Campaign for Education, 2005).

Zambia's debt load, both external and internal, has many causes. The price of copper continued to fall after 1975 and eroded national income. At independence in 1964, the purchasing price of one pound of copper was \$2.00, reaching a peak price of \$3.20 in 1966. Prices began falling continuously in the 1980s until in 2002 it was worth only \$.60 per pound (Ellyne, 2002). As the national income declined from the loss of copper sales, the government dramatically increased foreign borrowing from US \$250 million in 1965 to almost US \$7 billion in 2001. As foreign borrowing failed, the Zambian government created more domestic money to cover the declining national income, but this only increased prices and inflation (Ellyne, 2002). Additional events occurred which accelerated Zambia's debt load. During the 1960s through the 1990s, Zambia was home to the freedom movements of Southern Africa and was a

victim of many attacks from conflicts in Namibia, Angola, Mozambique and South Africa. Zambia also hosted refugees from Congo and Angola for many years. As a result of this role, a significant portion of the domestic budget was diverted to security and related infrastructure development, and access to vital economic transport routes and markets to the south was lost (Zambia National Submission, 2004).

In April, 2005, the World Bank and the International Monetary Fund agreed that Zambia had taken the necessary steps to reach the completion point under the Heavily Indebted Poor Countries Debt Initiative. Debt relief from all of Zambia's creditors was slated to surpass US \$3.9 billion (World Bank, 2005, April 8). In September, 2005, the World Bank and the IMF made the debt reduction official (BBC News, 2005, September 26). However, some observers of the situation in Zambia think this debt reduction will not be adequate to make significant changes. "Even with full debt write off, projections show that Zambia would require additional annual resources of up to US \$50 million to achieve its Millennium Development Goals" (Zambia National Submission, 2004, p. 10).

A major complication to the development of Zambia's economic, educational, and social services provision is the high percentage of Zambians with HIV/AIDS. It affects the demand for education in three ways: 1) fewer children to educate due to death from HIV/AIDS; 2) fewer children able to afford education due to increased care-taking responsibilities at home; and 3) fewer children able to complete their schooling due to lack of adequate teaching staff

(Kelly, 2000). The Ministry of Education, in discussing the attrition level of teachers, states that while 2,226 teachers are being trained each year in teacher-training colleges, 1,500 are being lost annually due to HIV/AIDS, other illnesses, and change of careers. This leaves a net number of 700 teachers, which is far lower than the required teacher supply. "Teacher attrition in Zambia's public schools is increasingly becoming a major source of concern" (Lungwangwa et al., 1999, p. 39). The Ministry report continues that those teachers who remain in the classroom are underpaid, poorly housed, demoralized, poorly deployed, provided with little support in the field and given little instructional time (Lungwangwa et al., 1999).

The most recent report by The Ministry of Education in 2000 lists problems and challenges facing the government in the area of education provision: 1) inadequate infrastructure and school places; 2) inadequate capacity with human, material and financial resources; 3) resistance to change and fear of the unknown; 4) over-cautious fear of spending financial resources; 5) lack of consensus over certain important issues resulting in delay to implement; and 6) donor dependency syndrome (Ministry of Education, 2000). These problems continue to haunt the Ministry of Education in 2006, in addition to the enormous issues of poverty and HIV/AIDS, which are widespread throughout the nation.

The above historical perspective, while somewhat complex, is vital for an adequate understanding of the current status of education in Zambia. It is impossible to understand the complexity of educational provision without the

historical background pertaining to the inadequate number of educated Zambians available to lead the country at independence in 1964, the depressed economic situation that led to increased donor dependency, and the increasing poverty and HIV/AIDS problems. Without this perspective, it is also impossible to comprehend the frustrations in the lives of Zambian basic school teachers; yet, in the midst of these overwhelming odds, they continue to teach.

Theoretical Perspective

The 1996 educational policy of the Ministry of Education devotes little space to underlying theoretical rationale for education provision. It briefly notes that since Zambia is a liberal democratic society, the state is obliged to promote educational policies which focus on nurturing the holistic development of individuals and “to promote the social and economic welfare of society through the provision and renewal of the skills, knowledge and competencies necessary for the development of society and the economy” (Ministry of Education, 1996, p. 1). Because Zambia changed from a one-party system of government to a multi-party structure and also elected a new president in 1991, underlying theories of primary education were inescapably linked to anticipated economic growth. The need to develop human resources as a base for sustained growth became paramount to government officials and educational policy was subsequently influenced by Human Capital Theory (Musonda, 1999). The Ministry of Education supports the concept of individuals investing in education as a means of increasing their earning

capacity and production in the workplace, and ultimately increasing the country's economic growth (Musonda, 1999).

Human Capital Theory is supportive of individuals who invest in education and therefore become more productive and earn higher incomes (Honig, 1993). However, some educators and economists perceive serious flaws in this theory. Honig (1993) states that the informal sector, which refers to the labor of small firms and individuals often with minimal resources, has the highest opportunities for employment, but these micro-entrepreneurs may not voluntarily invest their time in vocational training of people and may therefore need incentive programs. Furthermore, because people do not live in a perfectly competitive market, structural inequalities may exist which give unfair advantages to some and undue hardships to others within the marketplace (Baptiste, 2001). Both Honig (1993) and Baptiste (2001) discuss concerns about the linkage of Human Capital Theory to education, stating that when education is purported as the sole solution to poverty and underemployment, the reality of social injustices and unequal power structures within society are ignored. Additionally, educational practices have deep cultural roots and an understanding of those roots is essential to identifying effective educational provision.

A second underlying theory to educational provision in Zambia is Social Reconstructionism, espoused by Brameld, who believed that the goal of education is to employ schools as agents for social change (Musonda, 1999). Social Reconstructionism emphasizes addressing social questions and creating a better

society in which students learn through participation in the democratic process. Students are encouraged to discern how to make meaning of their own lives and what their lives mean in relationship to the lives of others (Martin & Van Gunten, 2002). This theory is built on the values of liberal democracy, and Musonda (1999) states the 1996 Ministry of Education's policy is largely based on this theory; education is to be guided by the principles of liberalization, decentralization, equality, equity, partnership and accountability. In 1991, when Zambia reconfigured its political system and ideology, it embraced liberal democracy and coupled social change with educational policy.

A sub-theory of Social Reconstructionism is the idea of decentralization, and some researchers believe decentralization reforms are crucial to Zambia's educational provision (Musonda, 1999; Naidoo, 2003; Sampa, 2005; Verhagen, 2002). Decentralization is viewed as a redistribution of political power, giving local communities a greater management role and voice (Naidoo, 2003). The government's plan was to create local education boards in each district which would have some control over the education in their locale; however, although it was stated that by 2001 60 % of districts would have education boards, by 2002 only two of nine provinces had been allocated education boards as part of a decentralization pilot project in existence since 1993 (Verhagen, 2002). The idea of education decentralization has not been adequately defined and implemented yet. Several researchers noted that decentralization increases the complexity of the dialog for planning between the Ministry of Education and the external agencies

and may take several years to refine (Wood et al., 2003). Naidoo (2003) points out that decentralization is likely to generate inequities and be responsible for greater disparities in the quality of services provided across different regions.

Globalization Theory is also linked to educational provision in Zambia, since many educational programs are supported by international donors. The Ministry of Education in Zambia has come face to face with the idea of increasing global connectedness as it deals with the demands of various international donor agencies. The government acknowledges that the increase in donors has brought a welcome boost to the resource flow for education and has resulted in significant improvements throughout the country (Musonda, 1999). However, the increased donor giving has its own problems: each donor has its own legitimate need for access to administrators for data requirements and assessment measures; donors often have their favorite projects and glaring needs may be overlooked; and it becomes difficult for the Ministry of Education to maintain control of the projects (Musonda, 1999). One of Stuart's interviewees remarked that the external donor consultants only said what Zambian educators had been saying all along, but people listen more to a foreigner (Stuart, 1999).

Several researchers have cautioned about linking globalization to education in developing countries without further study of various implications and possible repercussions (Evans, 1991; Tikly, 2001). In addition, there are concerns about the involvement of African nations in the ensuing globalization process and the resultant effects on their existing culture and thought patterns (Avoseh, 2001;

Oduaran, 2000). Tikly (2001) argues for the development of a conceptual framework of globalization and education in which marginalized countries in Africa are at the center rather than at the periphery of the debate. One example of the marginalization of African countries is the effect economic globalization has on education in countries like Zambia. The main response to developing countries has been to impose structural adjustment policies on the countries by the World Bank and the International Monetary Fund. These structural adjustments are intended to make countries more competitive through lowering production costs and through making African countries more attractive to foreign investors (Tikly, 2001). However, as evidenced in Zambia, structural adjustments can disrupt the growth of educational provision by necessitating a freeze on hiring teachers who are desperately needed in the schools. Thus, further study of the link between globalization and education is required to fully understand the ramifications of globalization in low income, postcolonial countries like Zambia.

Significance of the Study

What does the future hold for both rural and urban basic school teachers and students of Zambia? Many people and organizations have written about the provision of education; these sources are all in agreement that progress in education rests on two main points: 1) strong commitment to teacher training and educational provision by the Zambian government; and 2) donor help to ensure the Ministry of Education's goal of Education for All is met. With Zambia's recent attainment in 2005 of the completion point of the Heavily Indebted Poor Countries Initiative

proposed by the World Bank and International Monetary Fund, funds which previously went toward debt reduction are now available for use by the government for fighting poverty, decreasing the incidence of HIV/AIDS, and bolstering the provision of education for all children (BBC News, 2005, September 26). It is still too early to determine whether debt reduction by the World Bank and International Monetary Fund will make a substantial difference in the attainment of Education for All and the Millennium Development Goals. Zambia is already identified as one of the countries at risk of not reaching the Education for All goal (Wood et al., 2003). The dearth of educational funds has far-reaching ramifications for both teachers and students.

In addition to budgetary issues, the population of Zambia continues to grow and it is predicted that the number of school age children will be approximately 2.3 million in the year 2010, which will be an increase of 39 % over the previous ten years (Siaciwena, 2000). This increase in the number of students needing an education will exert tremendous pressure on the existing school system. Without an adequate supply of qualified and competent teachers, the Education for All agenda will be difficult to be realized (Lewin & Stuart, 2003).

With the reality of these enormous overwhelming odds in mind, this study was designed to determine whether in-service, on-site teacher training has value within rural and urban Zambian basic classrooms and whether it can increase teacher competence. As mentioned in the theoretical perspective section, teachers feel a strong need for more in-service training; they feel marginalized when such

opportunities are not available to them. Consequently, this study examined whether teachers who receive in-service, on-site training become more effective teachers and, hopefully, increase learning within the classroom.

Due to economic shortages and transportation difficulties, substantive in-service on-site seminars are practically non-existent and opportunities for educational advancement are expensive and fraught with seemingly insurmountable obstacles. The long term goal of this research is to provide a basis for grant-funded projects to work with several Zambian teachers who would routinely provide in-service training for basic school teachers on site. There is a high possibility for success of this endeavor due to two reasons: 1) teacher salaries in Zambia are low compared to Western salaries and grant-funded money could adequately compensate several teachers for a number of years; and 2) the major cost for in-service, on-site training is transportation to each school and this, too, could be sufficiently funded by a grant. With the recent increase of attention given to Sub-Saharan countries by both celebrities and educators, there is an increased likelihood of securing grant funding for in-service, on-site teacher training in Zambia.