



Republic of Zambia

Ministry of Education, Science Vocational Training and
Early Education

Orphans and Vulnerable Learner's Bursary Scheme Guidelines

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**MINISTRY OF EDUCATION, SCIENCE, VOCATIONAL TRAINING AND EARLY
EDUCATION**

Acronyms

1	AIDS	Acquired Immuno Deficiency Syndrome
2	CAMFED	Campaign for Female Education
3	CWAC	Community Welfare Assistance Committee
4	CSO	Civil Society Organisation
5	DEBS	District Education Board Secretary
6	DSWO	District Social Welfare Office
7	DWAC	District Welfare Assistance Committee
8	FAWEZA	Forum for African Women Educationalist Zambia
9	GRZ	Government of the Republic of Zambia
10	HIV	Human Immunodeficiency Virus
11	HQ	Head Quarters
12	MESVTEE	Ministry of Education, Science, Vocational Training and Early Education
13	OVC	Orphans and Vulnerable Children
14	OVL	Orphans and Vulnerable Learners
15	PEO	Provincial Education Office
16	PSWO	Provincial Social Welfare Officer
17	PTA	Parent Teacher Association
18	PWAS	Public Welfare Assistance Scheme

Introduction

Zambia is one of the African countries hardest hit by HIV and AIDS. About 19 percent of the children less than the age of 18 years old or 1.1 million are orphans; most of them due to the HIV and AIDS epidemic which is fuelled by high poverty and unemployment levels. Consequently, the average number of able adults (capable of caring for Orphans and Vulnerable Children (OVC)) has declined. The combined effect of this suggests critical consequences for the well-being of these OVC, as well as the ongoing viability of their communities, economies and societies. Therefore, providing care and support for OVC is one of the biggest challenges the country faces today, as the growing numbers overwhelm available resources. Without adequate protection and care, these OVC are more susceptible to child labour, sexual abuse and other forms of exploitation, increasing their risk of acquiring HIV infection.

This status quo has also increased the risk for such learners to either drop out of or fail to access education especially at post primary levels where tuition fees are levied. In 2011, out of 3,478,898 learners at Grades 1 to 9, there were as many as 602,055 orphaned learners. This represented 17.3 percent of the enrolment and 49.5 percent of these were female learners. Similarly, at Grades 10 to 12 out of 251,632 learners as many as 65,183 were orphans. This figure represented 25.9 percent of the school population and 48.9 percent female orphans in school.

Addressing the needs of OVC and mitigating negative outcomes of the growing OVC population is a high priority for the Government of the Republic of Zambia. There is universal consensus that access to education is a human right. This fact is reaffirmed in the Education Act of 2011. As the custodian of human rights, Government through the ministry responsible for education is obliged to ensure that all children including OVC have access to quality education.

In order to expand access to education, the ministry responsible for education in Zambia has been implementing a policy of tuition free primary education in public schools since 2002. Learners at post primary education levels are however, still required to pay tuition fees. Empirical evidence has revealed that tuition fees are the biggest barrier to learners accessing education in Zambia.

In the light of the above, the Government of the Republic of Zambia (GRZ) through the Ministry of Education, Science, Vocational Training and Early Education in close collaboration with the Ministry of Community Development, Mother and Child Health,

traditional, local authorities and others will continue to implement a bursary scheme that will among other things also pay special attention to the plight of female learners and orphans.

Definition of OVC/OVL

The Zambian government defines an orphan as a child below the age of 18 years who has lost one or both parents. A vulnerable child is below the age of 18 years and has been or is likely to be in a risky situation where he or she is likely to suffer significant physical, emotional or mental stress that may result in the child's rights not being fulfilled. A vulnerable child falls into one or more of the following risk groups: is HIV-positive and/or chronically ill; lives without adequate adult support; lives outside of family care (e.g., in residential care or on the streets); is marginalized, stigmatized, or discriminated against; comes from a poor family that cannot adequately provide them with basic needs; is involved in child labour including sex work; abuses alcohol and other drugs; is used by adults to commit crimes; is disabled; is exposed to early pregnancy and marriage and sexual exploitation; lives on the street and public places; or is trafficked to other places.

An OVL, on the other hand, is a child from this category who is enrolled in learning institutions.

The universal recognition that this category of children faces the greatest risk of either dropping out of school or not enrolling at all makes the implementation of a bursary scheme very necessary particularly at this time when the country is aspiring to increase equitable access to quality post primary education.

Guiding Principles for the Bursary Scheme

Three major principles will inform the implementation of the bursary scheme:

1. **Demand driven** – the scheme will respond to demand from the secondary schools and colleges of education;
2. **Objectivity** – selection of beneficiaries will be based on stringent use of specific criteria; and
3. **Transparency** – the selection process will reflect assessment of individual circumstances to authenticate eligibility and respond to real needs.

Objectives of the Bursary Scheme

The objectives of the bursary scheme are:

1. To improve access to secondary and teacher education for vulnerable groups including females, orphans, and the poor;
2. To improve retention, progression and completion rates for vulnerable learners at secondary and teacher education levels;
3. To increase the retention, completion and achievement of females in secondary schools and colleges of education; and
4. To accelerate the process of mainstreaming gender equity in the education system.

Bursary Provision

Tuition and examination fees are the major impediment to access to education, funds should therefore, be used to pay for these. However, in instances where there are excess resources, the Selection Committee, using their discretion, can also consider using the funds for other requisites.

Primary level (Grades 1-7)

Bursary support at this level will not apply (at least not from GRZ funds) because of free education policy from grade 1 to 7. However, there are stakeholders who are providing bursary support in form of Uniforms, shoes and other requisites to learners at this level of education delivery and these organisations are encouraged to continue with their support. The following is the package that constitutes the free basic education policy of 2002 and the justification for not providing bursary support at this level:

- No pupil at grades 1-7 should be levied any user fees, including PTA levies;
- Enrolment of pupils shall be unconditional and should not be linked to contributions of items such as cement, reams of paper, slashers, candle, mops, detergents, etc;
- Wearing of school uniforms is not compulsory. Schools that choose to continue with uniforms should acquire them from a cheaper source and not turn it into a fund raising venture;
- Teachers should note that remedial teaching is part of their professional responsibility and should therefore not charge them any fees for extra tuition undertaken within the schools;

Secondary level (Grades 8-12)

The provision of bursary support at this level will continue until the implementation of the free education policy as proposed by government. In this regard, the support will cover the following:

- 1) Tuition fees and other costs such as PTA fees and Boarding fees
- 2) Full uniform
- 3) Stationery- This include exercise books, pens and pencils and calculator depending on the grade of the pupil
- 4) Transport money shall be considered where appropriate. These costs will vary between schools and location (urban or rural location or district) and will depend on the availability of funds

Colleges of Education level

- 1) Tuition, Boarding and Project fees
- 2) Stationery- This include text books, exercise books, pens and pencils and calculator.

Identification and Selection of Beneficiaries

The following category of learners at Secondary and College level will be eligible to access the bursary:

- i. a learner from a female headed household and who falls under the category of 'poor' as defined by the community;
- ii. a learner from a household headed by a child;
- iii. a learner with a single or double orphan status and whose extended family are unable to meet education costs;
- iv. an orphan or neglected female from a household that is classified as destitute, according to the Public Welfare Assistance Scheme (PWAS) criteria;
- v. a learners whose parent(s) are incapacitated by illness
- vi. a learner (priority being given to females) must be entering or already in either a college of education or a secondary school and cannot proceed to higher level because of lack of funds;
- vii. a learner who is already in either a college of education or a secondary school and has shown the ability to progress to a higher year or grade, but is unable to do so due to household poverty;
- viii. a learner who left school for various reasons and wishes to return and is within the school age range; and

- ix. Any vulnerable learner who has completed grade 12 with satisfactory results and wishes to pursue studies in teaching at a public or grant aided College of Education.

Note that there is no specific criterion for learners with special educational needs but they are eligible if they meet the above selection criteria.

Who identifies the beneficiaries?

Identification of the beneficiaries will be done by a member of staff responsible for guidance and counseling, the heads of institutions with assistance from the Selection Committees and the Community Welfare Assistance Committees (CWACs) or Social Welfare Office.

Selection process and procedure

Selection will be done by the selection committees based in schools and colleges of education while the DEBS, PEO and Ministry HQ will provide oversight. The success of the selection of beneficiaries will depend on the committees' level of involvement with the target group.

There will be a five-step selection process which is as follows:

- 1) The selection committee identifies and short list needy learners.
- 2) The selection committee calls a meeting to inform the community of the short-listed learners. In the case of the college, the selection committee meets to shortlist the learners.
- 3) The secondary school based selection committee sends the list to the DEBS and PEOs while the one at a college of education submits the list to the PEOs and National Headquarters.
- 4) The DEBS/PEOs in collaboration with the DSWOs/PSWOs will verify, approve and allocate funds for the submitted list.
- 5) The DEBS/PEOs will inform the schools/colleges the approved list who in turn will notify the selected beneficiaries.

Selection Committees should forward all the relevant documents on the learners identified to the DEBS/PEOs office while DEBS and PEOs should forward the relevant documents to Headquarters. For the colleges of education, students will be required to

produce a social welfare report to the college which contains information about the applicant and the recommendations.

Procurement of materials

Procurement will be done by the School Based Committee members preferably the Guidance and Counseling teacher in collaboration with the accounting officer and a member of the Community. In the case of the Colleges, procurement will be done by the College Based Committee with a Board member and a student union representative.

Composition of the Selection Committee

The Selection Committee should have a membership of no more than ten (10) members.

Secondary School level

The members shall include:

- i. The Deputy Head (Chairperson)
- ii. The officer from Ministry of Community Development, Mother and Child Health (Department of Social Welfare);
- iii. Ministry of Health representative;
- iv. PTA/ Board representative;
- v. Clergy person;
- vi. Member of the Community;
- vii. Representative from the business community;
- viii. Guidance and Counseling teacher (Secretary)

College of Education

The members shall include:

- i. The Deputy Principal (Chairperson)
- ii. The officer from Ministry of Community Development, Mother and Child Health (Department of Social Welfare);
- iii. Board representative;
- iv. Clergy person;
- v. Representative from the business community;
- vi. Student representative; and
- vii. A member of staff preferably the one responsible for Guidance and Counseling (Secretary).

Roles of the School/College based Committee

- i. Identifying recipients for bursary support
- ii. Assessing candidates for the bursary according to how many characteristics they have under each group of qualifiers.
- iii. Holding meeting to deliberate on issues of OVC and keep records of these meeting;
- iv. Providing termly reports which should include details of meetings, monitoring of learner attendance, lists of names of learners and copy receipts issued under the bursary scheme
- v. Communicating to the parents/guardians of the pupils that have been selected for bursary support.
- vi. Purchasing of school requisites for the beneficiaries
- vii. Monitoring the progress of the bursary recipient

Roles of the DEBS and PEO

- I. Compile , consolidate and submit to ministry HQ the list of OVC including the beneficiaries of the GRZ OVC Bursary Scheme
- II. The DEBS/PEO in collaboration with the DWACs ensures that the ratio (60% girls and 40% boys) is adhered to and is fully representative of those groups that the scheme seeks to assist;
- III. Disbursement of funds to secondary schools (in case of PEO) and to grades 8 and 9 (in the case of DEBS)
- IV. Monitor utilization of resources at secondary schools and colleges of education
- V. Orient School Based Committees on the use of GRZ OVC Bursary Scheme Guidelines in the selection procedures; and
- VI. Scrutinise the lists from each School and College Based Committee.

Disbursement of funds

- I. Disbursement will be done every year. (Letter will be written by the Permanent Secretary to assure that schools that monies coming and that no child should be sent away before the support is disbursed).
- II. HQ to disburse funds through the DEBS/PEO and directly to Colleges of Education

- III. DEBS/PEO will disburse funds to schools

Monitoring and Reporting

- I. PEO/DEBS/DWACS will monitor the institution once a term;
- II. When monitoring the Education Bursaries, the head of the institution will be required to show the lists of names of learners and copies of receipts issued under the bursary scheme;
- III. In some cases, HQ, Education Standards Officers, Provincial Senior Planning Officers, District Planning Officers, Accounts Officers and DEBS may monitor and the same requirement will apply;
- IV. Lists will be checked against the records of payment held by the Head Office and the financial management department. The head of the institutions will be asked to explain if there are any discrepancies;
- V. Provide termly monitoring reports which should include details of visits, meetings with the College or School Based Committees, attendance and performance of the beneficiaries; and
- VI. Provide consolidated annual monitoring reports.

Retirement of funds

- I. Schools, Education boards/College boards will retire the bursary funds with photo copies of receipts to ministry HQ through DEBS/PEO and provide an expenditure report.