

The Cost of a 'Free' Primary Education in Tanzania

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Introduction

One of the most widely heralded educational policy reforms of the past few years has been the elimination of primary school fees in countries where pupils and parents have been responsible for such costs. Consistent with the goals of Education for All (EFA), international organizations and national governments in many Sub-Saharan African countries have joined together to increase access to schooling by abolishing fees and other mandatory contributions. The logic for such a change in policy is clear: If the cost of schooling is too high, poor parents will not send their children to school; therefore, the elimination of compulsory charges will lower the cost of education and increase the number of children in school. Indeed, several studies suggest that the recent elimination of school fees in East Africa is the reason for the rapid increase in primary school enrollment (Glewwe & Zhao, 2005; International Monetary Fund and the International Development Association [IMF & IDA], 2001, 2004). EFA has also heralded a new era for girls' education in Africa, with global attention directed toward redressing gender disparities in enrollment and attainment through the lowering of school-related costs and other mechanisms (Bloch, Beoku-Betts, & Tabachnick, 1998; Samoff, 1999). Yet what if fees are only a fraction of the cost to parents to send their children—boys and girls—to school? What if schools cannot maintain themselves without required “contributions” from parents because governments do not keep their financial promises? What if policies to abolish fees and other expenses satisfy international stakeholders but do not significantly reduce the financial burden of schooling on families, thereby necessitating children's labor in poor households?

These are some of the niggling questions about the relationship between school fees and primary education, and between policy and practice, explored in this article about the Primary Education Development Plan (PEDP) in the United Republic of Tanzania. We consider how educational policy in heavily indebted countries, such as Tanzania, is shaped by international and national configurations of power that are reflected in policy discourse and policy

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implementation at the local level. Our analytical approach draws on the work of Stephen Ball (1990), as well as critical discourse analysis (CDA), which assumes that the relations of power can be discerned by tracing the production, circulation, and implementation of a given policy (Fairclough, 1992; Rogers, 2004). This requires looking at parallels between economic policy shaped by international financial institutions and national education policies in Africa, and it involves exploring the degree of local awareness of domestic reforms intended to improve the lives of the populace. With this view of policy studies in mind, we first situate the study of PEDP within a broader international context and then examine its implementation in northern Tanzania.

International Influences on Education Policy

Similar to many countries in Sub-Saharan Africa, Tanzania experienced a serious economic downturn during the oil crises of the 1970s. The situation was compounded in its case by a costly war with neighboring Uganda and the stagnation of its agricultural sector (Holtom, 2005; Wagao, 1990). Despite Tanzania's socialist leanings during the 1960s and 1970s, it remained a popular recipient of loans from the World Bank because of its political stability and the vision of self-reliant development promoted by its first president, Julius Nyerere. This relationship changed, however, in the late 1970s as the political-economic climate in the North Atlantic shifted from favoring state-led development to promoting neo-liberalism. This meant that Tanzania's planned and highly regulated economy was no longer seen as healthy for its development; the advice from the World Bank (WB) and International Monetary Fund (IMF) was now to liberalize, privatize, and deregulate its industrial and agricultural sectors. President Nyerere refused to make all but the most modest changes in this direction because he felt it was anathema to his philosophy of *ujamaa*, or African socialism. The strained relationship between the Tanzanian government and the international financial institutions led to an intensification of the economic crisis as loans ceased from many development organizations. In this climate of crisis, Nyerere resigned in 1985 and was replaced by Ali Hassan Mwinyi, who quickly consented to the terms of the WB and IMF loans and restored the flow of aid into the country (Harrison, 2001; Holtom, 2005).

During the Mwinyi administration, a number of macroeconomic changes were instituted that reversed the policies of the previous decades. For example, the government began a process known as structural adjustment that necessitated the devaluation of the Tanzanian shilling, the reduction of tariffs on imported goods, and the implementation of user fees for social services (Ponte, 1998; Samoff, 1994; Wagao, 1990).¹ These policies continued, and in some cases intensified, during the presidency of Benjamin Mkapa that lasted from 1995 to late 2005, when Jakaya Kikwete was sworn in as Tanzania's fourth president. To their credit, the policy reforms from the Mwinyi through the Mkapa administrations

have been credited with a pronounced economic recovery that continues to the present (Holtom, 2005; Vavrus, 2005).

Despite these improvements during the period of structural adjustment, the IMF determined in 1999 that Tanzania had an “unsustainable debt burden” and recommended debt relief as part of the Heavily Indebted Poor Country (HIPC) Initiative (IMF & IDA, 1999, p. 37). An initiative developed by the IMF and the WB in 1996, HIPC seeks to link poverty reduction, debt relief, and macroeconomic reform to improved social service provisions. Eligible countries prepare a Poverty Reduction Strategy Paper (PRSP) that spells out how the government will redirect money that would have gone to debt servicing toward areas like education and health. Tanzania’s first PRSP was approved by the IMF and WB in 2001, and the second one was accepted in 2005. These two poverty reduction strategies continue to serve as a benchmark against which a wide range of reforms are measured, including progress in the quality and quantity of primary education.

Poverty Reduction and Primary Education Policy

The first PRSP made an explicit connection between debt relief and poverty reduction through the medium of primary schooling. It stated that educational access would be enhanced through the elimination of school fees: “The government will ... abolish primary school fees in order to ensure that children, especially from poor families, will have access to primary school education” (United Republic of Tanzania, 2000, p. 26). Subsequent official documents affirmed that school fees had been eliminated. For example, the IMF and the International Development Association [IDA] branch of the WB published its *Joint Staff Assessment* of Tanzania’s PRSP in November 2001. The assessment praised the country’s PRSP and the abolition of fees, and it indicated its support for other changes in primary schooling that would appear the same year as the Primary Education Development Plan:

In education, the government, along with several donor partners, has articulated a comprehensive basic education strategy that addresses most of the systemic issues needed to improve service delivery and quality over the medium term. During 2000/01 *it has also abolished school fees at the primary level* [italics added], increased significantly the budget allocation for education, introduced capitation grants and an investment fund to directly support schools at the local level, and established an education fund to support children from very poor families. (IMF & IDA, 2001, p. 2)

The plan, PEDP, is a five-year effort (2002-2006) to improve both educational quality and access in Standards 1-7 through the mechanisms outlined above in the *Joint Staff Assessment*. It is considered by some observers to be “the most

significant intervention in the primary education sector in the last two decades” because of the impressive gains in enrollment, provision of textbooks, and classroom construction that have occurred between 2002 and 2006 (HakiElimu, 2005, p. 1). For instance, the enrollment goal for 2002, the first year of post-policy reform, actually exceeded the target of 1.5 million students (Sumra, 2003); in addition, nearly 30,000 new classrooms were built from 2002 to 2004 (World Bank, 2005). In terms of educational quality, the measure most frequently used is the pass rate on the national Primary School Leaving Examination at the end of the seven-year primary cycle. This rate has increased significantly during the years of PEDP, from 22% in 2000 to nearly 50% in 2004 to slightly more than 70% in 2006 (Ministry of Education and Vocational Training, 2006; Namkambe, 2006).

For our purposes, one of the key aspects of PEDP is its unambiguous stance regarding the elimination both of school fees and other mandatory expenses. The policy stated the following: “Serikali itafuta *ada za shule na michango yote ya lazima inayotolewa na wazazi kuanzia Julai 2001 ili pasiwepo mtoto yeyote atakayenyimwa haki ya kusoma*” [The government will *eliminate school fees and all mandatory contributions* contributed by parents beginning July 2001 so that there will not be any child denied his/her right to an education](United Republic of Tanzania, 2003, p. 7; italics added). Given this statement, one could assume that after 2001, school fees and mandatory contributions were no longer the responsibility of parents; however, the section below indicates that this is not the case. Despite the clarity of the PEDP text, the 2005 PRSP presented a more ambiguous position vis-à-vis fees and contributions. It suggested that elimination of these costs was not a completed project but rather was an ongoing process: “The Government will maintain its current policy of abolishing primary school fees and related contributions” (United Republic of Tanzania, 2005, p. 44). In short, the government no longer claimed that school fees and other contributions had been abolished in 2001. Instead, the second PRSP made an allowance for not achieving this two-part goal through its use of the present continuous form of the verb “abolish”, i.e., the government “is abolishing” where it could have used the simple past tense—“abolished”—to state unequivocally that fees and other required costs for parents were no more. Although a subtle change in discourse, the shift from the declarative—“will eliminate”—and simple past tense—“abolished”—to “is abolishing” marks an important distinction between a goal that has been achieved and one that is still being sought. Its subtlety provides the government with a degree of ‘wiggle room’ in that it can say publicly to key international and national stakeholders that school fees have been eliminated while leaving open to local interpretation the matter of whether schools can require contributions from parents. This is a matter explored in greater detail below.

‘Free’ Primary Education in Northern Tanzania

In August 2006, we started the second phase of the longitudinal research project begun in 2000. Its primary goal is explore the impact of post-primary education on the life course of young women and men in a community on the slopes of Mount Kilimanjaro. The community of Old Moshi, where the study is based, is typical of others on the mountain in that most children of primary school age are enrolled in school, and parents do their utmost to keep their children in school through Standard 7 and beyond.

Information about the lives of families in Old Moshi comes from a variety of sources. An ethnography of secondary schooling was conducted by Frances Vavrus in 1996 during a year of participant observation in the community. She has also conducted successive research projects in the area from 2000 to the present (e.g., see Vavrus, 2003). During the 2006-2007 academic year, she and Goodiel Moshi are collaborating on the second phase of the longitudinal study from which the quantitative and qualitative data below are derived. Mr. Moshi is a long-term resident of Old Moshi and brings to this study his ‘insider’ perspective as a former primary and secondary school student but also an ‘outsider’ point of view as a university graduate who has spent most of the past five years in another region of the country.

The initial phase of the longitudinal survey was carried out in 2000 with nearly 300 Standard 6 and 7 students attending four of the 11 primary schools in Old Moshi. In 2006, members of the team re-interviewed an adult member of the household to discuss changes in the family during the past six years. This process resulted in 276 structured interviews with adults between September and December 2006, as well as interviews with the four principals at the primary schools attended by the students in 2000. In addition, we held a focus group discussion with parents whose children are currently attending one of these four schools to explore qualitatively the data about school fees and related expenses that emerged from the surveys.

Looking first at the survey data, we asked parents the same question in 2000 and 2006 regarding the amount they had spent on their children’s primary schooling. In some cases, parents reported that they no longer had children in primary school, so we could not obtain comparable data in these cases. However, there were 44 cases where the family still had a child in Standard 6 (only a few had children in Standard 7), and they were asked about the costs for the same items today as in the 2000 survey. These costs included: (a) general school fees, (b) exam fees, (c) uniforms and sports clothes, (d) books and supplies, (e) transportation, (f) tuition classes,ⁱⁱ (g) pocket money, and h) other expenses, which parents were asked to specify. Given our particular interest in girls’ education, we examined gender-based differences in school-related costs, but

there were no significant differences in either expenses or enrollment in 2000 or 2006. However, there were differences in overall educational expenses over the past six years that may have implications for girls and boys from poor families.

The survey data paint a disquieting picture of changes in the cost of schooling during the past six years. Table 1 compares the central tendency in costs through the mean, median, and mode, as well as the variation in costs as reflected in the standard deviation, minimum, and maximum costs. As one can see, the minimum, maximum, and median costs have risen substantially during the 2000-2006 period with most families today paying 18,000 shillings to cover their children's expenses compared to 11,000 only six years ago. This is well above the expected increase in costs due to inflation, which the government reports to be steady at around 5% (Mramba, 2002). The difference in the means of the two samples—13,660 Tsh for 2000 versus 38,700 Tsh in 2006—is significant at the .01 level, suggesting that it is not due to chance rather but to other factors.

The significant increase in the total cost of schooling from 2000 to 2006 raised a number of questions we sought to address through interviews with heads of schools and with parents. For example, how does one make sense of explicit policy statements regarding the elimination of school fees and mandatory contributions when parents in Old Moshi attest to their continuation? Furthermore, if only school fees were abolished in practice and total school costs are increasing ahead of inflation, do parents believe that PEDP has benefited them? These questions provided a starting point for our discussions in Old Moshi.

There were two themes related to PEDP that emerged from our interviews with the principals of the four primary schools. The first of these we labeled “kuboresha elimu” to denote a phrase used by every head of school to describe how the policy has led to improvements in the standard of education at their schools. The principals were unanimous in their opinion of PEDP being the main reason for the higher pass rates on the Standard 7 examination, the improvements in school buildings, and the greater availability of textbooks and other teaching supplies. At one school, for example, the pass rate has increased from 7 students in 2002 to 51 students in 2005 out of a total of some 380 pupils. At this school and others, the principals noted the great improvement in the student-textbook ratio such that now there are only two or three students sharing a book compared to double or triple this number prior to PEDP. In addition, several principals described the improvements in the school infrastructure that were also obvious to us after not seeing the schools for a year or two. Since 2002, every school has built classrooms, painted others, added desks, and, in some cases, constructed kitchens and started on teachers' houses. These are not insignificant changes for schools that had had little infrastructure improvement

in the years prior to PEDP, and these administrators readily recognized the importance of such developments.

Although the changes reported by the school heads have taken place during the PEDP period, it was not always clear whether they were the result of government funding or of private funds. For instance, the principals mentioned building improvements as a result of PEDP development grants, but they also said that these funds only cover part of the costs. One headmistress gave an example of her school receiving 3.6 million Tsh (approximately \$2,800) through the development grant to build a teacher’s house but that it will cost nearly 7 million Tsh to complete it. The development grant can only be used to purchase certain building supplies, she explained, while the rest must be contributed by community members. She went on to say that there are some parents who willingly contribute but others cannot due to poverty or will not because their children or family will not benefit directly from it. In sum, PEDP is the source of funding for the improvements in textbook provision and teaching supplies at these schools, but it is not the sole source of the money used to expand and renovate school buildings during the past five years.

Table 1. Total School Costs for Standard 6 Students, 2000 and 2006.

Summary Measures	2000	2006
Mean	13,660	38,700
Median	11,000	24,000
Mode	11,000	18,000
Standard deviation	10,382	53,971
Minimum total costs	2,000	9,000
Maximum total costs	82,100	356,000
N	156	44

The situation whereby PEDP funding partially covers the cost of new buildings is directly related to the second theme from the interviews with principals: parents’ lack of understanding of the difference between a school fee and a school contribution. We asked the heads of school whether their students currently pay any fees, and they were adamant that students do not. However, they explained that every child must contribute a certain amount of money toward food and food-related expenses in order to cover the cost of lunch for pupils. The amounts varied somewhat across the four schools, but students in

every case are responsible for providing between one and four gallons of maize, one to two gallons of beans, and 1,500 and 3,000 Tsh to cover lunch-related costs. The school heads were quite clear that this is a contribution and not a fee. However, when we asked whether students who did not provide these items were sent home from school, the answer was affirmative. In addition, they noted that parents “must contribute” (*ni lazima wachangie*) to building projects or else classrooms and teachers’ houses would not be completed. Parents, they said, did not understand that the development funds schools receive through PEDP are not sufficient to complete the entire project.

The interviews with the heads of school suggest several reasons why parents might be confused about the difference between fees and contributions. The principals were correct in defining for us a school fee as something for which parents receive a receipt from the district office and that this fee has been abolished. However, the fact that food and various funds are required or else children are sent home from school means that “contributions” continue to be mandatory. Thus, the difference between a fee and a contribution is murky, at best, and might understandably lead to puzzlement on the part of parents and pupils.

Confusion was, indeed, what we found during the focus group discussion with parents when we asked about school fees, contributions, and PEDP. The six mothers and two fathers who participated in the discussion agreed with the heads of schools that the academic performance and school environment has gotten better during the past five years. One father, the participant with the highest level of formal education, explicitly mentioned PEDP as the reason for the new buildings and renovations of old ones as well as the increased number of books in the schools. Another person, a mother who is currently attending secondary school, had also heard of PEDP but did not know the details of the program. The remaining six parents had not heard of PEDP and appeared embarrassed by the fact that they could not tell us anything about it. This was especially notable when the father who did know about the policy launched into a description of how it has led to \$10 being deposited into an account for each pupil and that 80% of school expenses are now provided by the government. The parents were shocked to hear that their children had received such money without their being informed, but we explained that this is not exactly how the program operates. We clarified that the \$10 is a type of grant deposited in the school’s bank account and not given directly to students.

A further area of confusion was evident when we asked about parents’ responses on the survey to the question of “general school fees” and other school-related expenses. In contrast to the answers recorded by the research team, the parents told us they were not paying fees but rather had to make mandatory contributions and purchase costly items like uniforms, shoes, and sweaters. At

several points during the focus group discussion, parents used the term “fee” (*ada* in Swahili) instead of “contribution” (*mchango*) to describe some of these costs, suggesting that the distinction between the two is not as significant locally as it is in policy texts. This hunch was confirmed when we spoke to members of the research team who said that, despite the training sessions and the supervised piloting of the survey, they had interpreted the question to mean any required cost to parents. This demonstrated for us that it is not only parents of primary school students but also trained local researchers who consider fees and mandatory contributions to be one and the same.

Conclusions

The focus group discussion with parents was critical to our understanding of a number of puzzling issues that arose during the course of our analysis of PEDP. First, it clarified why our survey data showed a continuation of school fees when the policy explicitly stated that fees had been abolished. Had we not talked to parents about their answers on the survey, we might have concluded that the major policy-practice gap lies in the realm of fees; instead, the breach surrounds mandatory contributions that are not met by the government. Our review of PEDP indicates that the policy is very clear about the abolition of both fees and required assistance from parents but subsequent documents, such as the second PRSP, are vague as to whether they have been completely eliminated or whether the process of eliminating them is ongoing. This lack of clarity is not only apparent at the national level but also internationally because it is ‘school fee abolition’ and not ‘school fee and mandatory contribution elimination’ that has mobilized representatives from the World Bank, UNICEF, and community-based organizations to campaign on behalf of out-of-school children. If the goals of EFA are to be realized, then greater attention must be paid to the total cost of educating children and not only to formal school fees. An orientation to policy studies that considers policy’s discursive aspects, i.e., its authorization of certain forms of knowledge and exclusion of others, would foreground the analysis of shifting policy priorities and promises over time, as we have attempted to do in this article.

A second insight from the focus group discussion is the double-edged, or janus-faced, quality of national policy. International actors look upon PEDP as a way to insure that debt relief is directed at improving primary education and that a major impediment to school enrollment--school fees--is eliminated. Yet the policy, if it appears at all before the average Tanzanian, has poorly defined features and a limited impact on their overall financial burden for schooling. Without spending a significant amount of time in schools and communities ‘ground-truthing’ claims made by the government, the staff of international organizations cannot ascertain the extent to which the policies they support are actually practiced. Therefore, a different kind of policy research is required than

issuing assessments, such as the *Joint Staff Assessment* mentioned above, which draw heavily on appraisals by government officials rather than on evaluations by the people whose lives are supposed to be improved by policy change.

Our final comment regards the ways that this case study of PEDP in Tanzania highlights broader contradictions between EFA policy and practice. Education for All, like PEDP, is based on the widely-held belief that the barriers to universal, high-quality education can be eliminated through sound national policy guided by broad international benchmarks. Yet this construction of the solution to educational problems does not pay sufficient attention to disparate local-level power relations. In some cases, the most important ones relate to gender and, often, to girls' greater workload in the home that affects their educational opportunities. In other cases, the critical power differences lie in wealth disparities, ethnic hierarchies, racial distinctions, or a combination thereof. The case of PEDP illustrates that gender is not always the most important barrier to achieving education for all; in this instance, a family's ability to pay fees matters most to a child's future, regardless of his or her sex. Our point is that achieving any broad educational policy requires narrow attention to the different local contexts in which it will be implemented. Without such sustained attention to this level, the goals of EFA will remain commendable but hardly credible.

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- ⁱ Structural adjustment refers to macroeconomic policies designed to assist countries with large outstanding debts to repay their loans and balance their budgets. While the policies differ somewhat from country to country, they generally include privatizing national industries and assets, devaluing the currency, reducing tariffs on imported goods, shrinking the size of the civil service, and reducing government spending on social services such as health and education. Once a country commits to such macroeconomic changes, it becomes eligible for loans from the International Monetary Fund and the World Bank to ease the economic problems that necessitated assistance from international financial institutions.
- ⁱⁱ “Tuition” is the term used in Tanzania for classes taught by teachers outside of the regular school schedule for which parents pay by the lesson, day, or week. These classes often take place in schools at the end of the day, on weekends, or during school holidays.

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