

Asia-South Pacific Education Watch

EDUCATION WATCH TOOLKIT

A RESOURCE PACK
FOR EFA RESEARCH
AND MONITORING

Module 4: Monitoring School Fees and Education Cost

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The Asia South Pacific Association for Basic and Adult Education (ASPBAE) is a regional association of more than 200 organisations and individuals working towards promoting quality education for all and transformative and liberating, life-long adult education and learning. It strives to forge and sustain an Asia-Pacific movement dedicated to mobilising and supporting community and people's organisations, national education coalitions, teachers' associations, campaign networks, and other civil society groups and institutions in holding governments and the international donor community accountable in meeting education targets and commitments, ensuring the right of all to education, and upholding education as an empowering tool for combating poverty and all forms of exclusion and discrimination, pursuing sustainable development, enabling active and meaningful participation in governance, and building a culture of peace and international understanding.

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Education Watch Toolkit
A Resource Pack for EFA Research and Monitoring

Asia South Pacific Association for Basic and Adult Education (ASPBAE)

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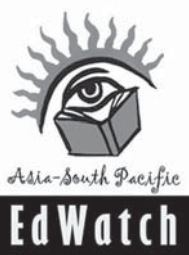


Asia South Pacific Association
for Basic and Adult Education
Learning Beyond Boundaries

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AND MONITORING

Module 4: Monitoring School Fees and Education Cost



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Acronyms

ASPBAE – Asia South Pacific Association for Basic and Adult Education

CAMPE – Campaign for Popular Education (Bangladesh)

EdWatch – Education Watch

EFA – Education for All

E-Net Philippines – Civil Society Network for Education Reforms (Philippines)

FGD – Focused Group Discussion

GMR – Global Monitoring Report

NEP – NGO Education Partnership (Cambodia)

NGO – Non-Government Organization

PTA – Parent-Teacher Association

PTR – Pupil/Teacher Ratio

UIS – UNESCO Institute of Statistics

UNESCO – United Nations Educational, Scientific and Cultural Organization

UNICEF – United Nations Children’s Fund



Doing field interviews, NGO Education Partnership (NEP, Cambodia)

Monitoring School Fees and Education Cost

THE REGIONAL CONTEXT

Since the World Education Forum in Dakar in 2000, a number of developing countries have removed school fees with dramatic impact towards increasing school enrolment. The coverage, however, has been limited and the momentum to abolish school fees has slowed down a few years after the Dakar conference. Today, school fees remain one of the biggest barriers in the expansion of schooling particularly in the poorest countries.

Parents spend a considerable amount for the education of their children. School fees and related expenses shouldered by parents indicate the gap in resources provided by the state for the education of its citizens. Monitoring family or household education expenditure and school fees is an important approach in appraising the extent of state responsibility and commitment to free and compulsory education for all. School fees and overall household expenditure on education are strongly correlated with school access, dropouts, learning achievement and outcome.

Many countries in the Asia-Pacific region have laws or constitutional provisions that guarantee the right to free primary education. Despite the legal guarantees, most countries in the region collect certain types of school fees and charges. Apart from the regular Parent-Teacher Association (PTA) contributions, parents usually bear the cost of their children's school supplies (including textbooks), uniforms, class projects, school events and extracurricular activities. They also contribute to expenditure on school equipment, repairs and maintenance. Tuition and examination fees are common in many countries in the region. On top of these, it is also the parents who shoulder the cost of transportation, food and lodging. Overall, education expenditure accounts for a significant portion of total household expenditure.

ASPBAE's EdWatch surveys showed that in 2006, total per child household expenditure on education is quite substantial. On an annual basis, the total private expenditure ranged from US\$30 to as much as US\$500 per pupil. In Cambodia, for example, annual expenses for sending one child to public school ranged from US\$34 to US\$153, with mean expenditure estimated at US\$108 per child per year. In the Philippines, total cost of public schooling ranged from US\$90 to US\$150 per pupil (excluding school meals and snacks). In Indonesia, some households paid as much as US\$480 in annual education expenditure per pupil. The Education Watch survey conducted in Bangladesh in 2006 revealed that the households spent an average of US\$37.40 per year per pupil at primary level and as much as US\$164 at secondary level. In Nepal, schools recover the cost of education through various fees charged to parents, such as admission, examination, building repair and maintenance, computer, library and other fees¹.

A World Bank study likewise noted that "public schools in both India and Pakistan charge tuition fees for primary education, as do schools in Bhutan and Nepal. Over half of the countries in this region also impose textbook fees and require PTA and community contributions. Uniforms are not generally compulsory, except in Pakistan²." The same study also revealed that in East Asia and the Pacific, tuition fees exist in Indonesia, Vietnam, China, Papua New Guinea, and the Solomon Islands.

School fees and other school charges deprive the poor and disadvantaged children of access to education, thus, further exacerbating inequity in education. It is for this reason that ASPBAE sees the importance of monitoring school fees and related charges, whether formal or informal, mandatory or "voluntary." Noting further that poverty and the opportunity cost of schooling are factors that contribute significantly to school dropout, it is also important to develop appropriate interventions to ease the burden on poor families and provide incentives to keep children in school.

¹ Please refer to the EdWatch summary reports available at the ASPBAE EdWatch Publications at <http://www.aspbae.org/>

² World Bank. 2004. Education Notes: School Fees: A Roadblock to Education for All. Washington: World Bank.

EXPENDITURE MONITORING INSTRUMENTS

Household expenditure on education refers to the total cost of education or schooling shouldered by parents or households, including the incidental cost of education such as rentals or lodging, computer and encyclopedia purchases, and so on, whether officially required by the school or not. Household expenditure on education is also referred to as the “private cost of education”, or the education-related expenses shouldered privately by parents or the households as differentiated from the costs which are covered by state or public resources. Thus, the term private in this context refers to parents or families or households. For current purposes, the term households will be used to refer to families.

The private cost of education is sometimes associated with user fees or school fees since these terms are sometimes broadly defined as those fees, charges and related expenses that are shouldered by the users. In some context, specifically in developed countries and well-funded urban schools, practically all school-related expenses are covered by public or school funds, including meals and snacks, school supplies, school events, off-class tutorials and remedial sessions, uniforms, and even school buses, shoes and bags. When the state does not cover all these expense items, schools charge fees to precisely cover the cost of items such as meals, uniforms or bus fares. This may be the reason why all school-related cost items are sometimes broadly referred to as school fees and charges.

In its strict definition, however, school fees basically mean tuition fees and other school charges, such as examination fees, library fees, laboratory fees, textbooks, miscellaneous fees, health fees and so on, but excluding other cost items such as uniforms, school supplies, meals and transportation.

Objectives

The monitoring instrument on school fees/education cost is designed for the following objectives:

1. Determine household expenditure on education and its share in the overall household budget;
2. Generate data on the types and amounts of school fees, charges, contributions and other education-related expenses shouldered by parents or households;
3. Assess the impact of school fees on education access, quality and equity;
4. Recommend measures to eliminate school fees and identify expense items that can be targeted for subsidies.

Target Informants/ Respondents

1. Household heads/parents
2. Teachers
3. Older students
4. PTA officers
5. School Principals
6. District/Division Education Officials
7. Village officials
8. Civil Society representatives

Basic Content of Monitoring Instruments

Information on education expenditure and school fees can be obtained through household surveys, focused group discussions and interviews with key informants. Data on school information, including schedule of fees and charges, may also be culled from policy documents of the Ministry of Education and school reports, although information on informal fees and voluntary contributions are generally not available on record.

A. School Information Sheet

1. Basic School Information – *Location, proximity, school type, infrastructure and facilities, enrolment size, number of teachers, date of establishment*
2. Performance indicators – *Net Enrolment Rate, Cohort Survival, Completion, Dropout Rates, PTR, Class Size, etc.*
3. School Budget – *total amount and breakdown by recurring, capital and development cost*
4. Sources of funds – *apart from central funds*
5. School Policies – *related to payment of fees, charges, contributions and donations*
6. Annual Reports – *on school revenues, collections and donations*

B. Breakdown of Major Education Cost Items

1. Tuition fees
2. Other school fees/charges
3. Private tutoring
4. School uniforms
5. School supplies
6. Meals/snacks
7. Transportation
8. Pocket money

These cost items may vary from one country to another and may be categorized in various ways. One way is to classify the cost items broadly into direct and indirect costs.

Direct costs (see Table 1) are school-related expenses required or needed to enroll, attend, learn and participate in class and school activities, including mandatory or 'voluntary' contributions for school purchases, maintenance, repairs and related expenses.

Table 1. Examples of Direct School-related Costs

School fees	Tuition fees, entry fees, registration fees, examination fees, library fees, computer fees, laboratory fees, equipment fees, maintenance fees, utility fees, graduation fee, miscellaneous fees, and other school fees (including contributions, donations and other forms of charges)
Teaching expenses	Teachers fees, teacher aides, extension classes, private tutoring, teaching materials, gifts
Learning materials	Textbooks, workbooks, handouts, reference materials
School clothing/ accessory	Uniforms, shoes, sportswear, bags, tie, scouting/military uniforms
School supplies	Paper, notebooks, pens, pencils, class assignments and projects
PTA contributions	Including contributions for school/class projects
Student fees	Class association, student papers/journals
Health service charges	Health checkup, vaccination, Red Cross, other health services
Space & Security charges	Parking, bike watcher, lockers, public security
Other charges and contributions	Scouting fees, sports activities and events, extracurricular activities, other school events, ceremonies, picnics, recreation and parties, contests, donations and fund drives

Indirect costs (see Table 2) are those expenses that are incidental to the child’s schooling but are nonetheless necessary to be able to attend and learn in school. These include the following: meals and snacks, transportation, board and lodging, and pocket money.

Table 2. Examples of Indirect School-related Costs

Meals and snacks	Cost of food and drinks eaten in school or taken to school
Transportation	Cost of school bus, public vehicles and/or gasoline to bring children to and from school
Board and lodging	Cost of food and rental for staying in dormitories or lodging houses of students who are living away from the school
Other incidental costs	Includes such items as home desks, home computers, internet connections, dictionaries/encyclopedias needed to assist students in completing school-related work outside of school hours

Methodology³

Data on education expenditure are obtained primarily through surveys using structured questionnaires to obtain the specific breakdown of school-related expenditure which varies by family and by school type, location and level. This can be supplemented and validated by information culled from focused group discussions and interviews of key informants.

1. Structured interviews – a structured set of fixed questions is administered by survey enumerators to the target respondents, specifically household heads and older students.
2. Semi-structured interviews – a list of relatively broader questions are asked of target informants, in contrast to the structured questionnaires, to guide the conduct of the interview.
3. Focused Group Discussions (FGD) – involve a manageable group of informants who sit together to discuss particular questions or issues, providing information and insights related to the topic.

³ Refer to *Overview of the Research Process* for a more detailed discussion on data gathering methods and research instruments (Annexure of *Education Watch Toolkit: A Resource Pack for EFA Research and Monitoring*).



Girls scooping up plastic bottles in Cisadane River, Bogor, West Java (E-NET for Justice, Indonesia)

Other sources of information on school fees and education expenditure:

1. Household income and expenditure surveys
2. Ministry of Education policies on fees, charges, contributions and donations
3. Education and school budgets
4. School annual reports on revenues, collections and donations

It is important to note that countries have different policies and practices on school fees and collection system. Cost categories may become confusing since a particular cost item in one country may be called differently in another. In some countries, school cost items cannot be categorized in any meaningful way. Parents and other informants also do not differentiate on the type of cost item, whether direct or indirect, voluntary or mandatory, and so on. For all these reasons, it is important to do a pre-test of the instrument/s to be used in the research inquiry to ensure common language and to validate the effectiveness of the questionnaire and methodology.

In doing the analysis for the information collected, the following can be noted:

1. Compute the share of the major cost items to total annual payments made.
2. Rank the cost items and compare differences in share and ranking by school level, gender, geographical location, type of school and so on.
3. Which cost item/s contribute/s most to keeping a significant proportion of children out of school? How much will it cost the government to cover such costs?
4. How much is the annual payment shouldered by the household for the education of children? What is the proportion of total school cost to household income or to the prevailing minimum wage?

SAMPLE OUTPUTS

Tables 3 and 4 are sample outputs generated from the surveys in Bangladesh and the Philippines conducted in 2006 as part of the EdWatch initiative covering 11 countries in the Asia-Pacific region.

Table 3. Average annual private expenditure per student in Primary Education by location (rural and urban) and type of institutions, 2005, in Taka, Bangladesh

Type of institutions	Rural			Urban			Both		
	Boys	Girls	Both	Boys	Girls	Both	Boys	Girls	Both
Government Schools	2,551	2,463	2,507	2,755	2,690	2,724	2,596	2,511	2,554
Non-Govt. (Regd.) Schools*	2,145	1,974	2,060	3,728	3,470	3,603	2,545	2,327	2,438
Non-Govt. (Non-Regd.) Schools	1,785	1,775	1781	2,568	2,746	2,663	1,938	1,939	1,939
Community Schools	1,729	1,670	1700	1,675	1,541	1,609	1,719	1,643	1,682
Non-Govt. (Regd.) Madrasa	1,740	1,723	1733	3,654	4,070	3,855	2,230	2,423	2,324
Non-Govt. (Non-Regd.) Madrasa	1,798	1,714	1756	2,733	3,067	2,893	2,015	2,012	2,014

* Govt. – Government; Regd. – Registered

Table 4. Average annual per student cost of education by level and type of school, 2005, in Peso, Philippines

Cost Item	Pre-School		Elementary		High School		College/ Post-Graduate	
	Public	Private	Public	Private	Public	Private	Public	Private
Total Fees & Direct Cost (books, workbook, supplies, uniform, sports, others)	1,647	3,706	1,437	6,842	2,473	8,781	10,714	27,442
Incidental Cost (transportation, tutor, rentals, other incidentals, except school meals)	603	1,020	1,013	2,225	2,773	3,487	6,936	9,070
Total	2,250	4,726	2,450	9,067	5,246	12,268	17,650	36,512

SAMPLE MONITORING INSTRUMENTS

Sample questionnaires for monitoring education expenditure and school fees are presented in the Annexures. The consolidated monitoring instrument in Annex 1 was developed based on the results of the EdWatch studies. Annex 2 presents the questionnaires which were actually used by the national coalitions in conducting the EdWatch surveys in Cambodia, Philippines and Bangladesh.

Annex 1: Monitoring Instrument on Household Expenditure on Education

Annex 2: Actual Monitoring Instruments on School Fees

- a. NGO Education Partnership (Cambodia) Questionnaire on School Fees
- b. E-Net Philippines Questionnaire on School Fees
- c. Campaign for Popular Education (CAMPE) Bangladesh Survey of Expenditure in Education

The instruments were designed to collect data on actual expenditure on school fees and related expenses; on cost of key inputs; on other charges such as PTA dues, student paper contribution, etc.; and indirect costs such as meals, transport expense and allowances.



Mother and child in IP learning center, E-Net Philippines

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Annexures

ANNEX 1: MONITORING INSTRUMENT ON HOUSEHOLD EXPENDITURE ON EDUCATION¹

	School Fees							
	Tuition fee	Entry/Registration fee	ID fee	Exam fees	Library, computer, laboratory, equipment	Maintenance & utility fees	Graduation fee	Miscellaneous fees and other school fees
Mode of Payment (Daily, Monthly, One time)								
HH Member #1								
HH Member #2								
HH Member #3								
HH Member #4								
HH Member #5								
HH Member #6								
HH Member #7								
HH Member #8								
HH Member #9								
HH Member #10								

	Teaching, Textbook, Uniforms and Supplies							
	Teacher & teacher aide fees	Private tutoring/private classes	Textbooks	Workbook, handouts and other materials	School Uniforms	Sportswear, shoes, bags, scouts and accessories	School Supplies	Class projects/ assignments
Mode of Payment (Daily, Monthly, One time)								
HH Member #1								
HH Member #2								
HH Member #3								
HH Member #4								
HH Member #5								
HH Member #6								
HH Member #7								
HH Member #8								
HH Member #9								
HH Member #10								

¹ Consolidated from the EdWatch survey experience.

Other Charges and Expenses										
	PTA	Student association fees	Student paper/journal	Health service charges	Security, parking, locker charges	Sports activities and events	School events and ceremonies	Recreation and parties	Donation and fund drives	Other Charges
Mode of Payment (Daily, Monthly, One time)										
HH Member #1										
HH Member #2										
HH Member #3										
HH Member #4										
HH Member #5										
HH Member #6										
HH Member #7										
HH Member #8										
HH Member #9										
HH Member #10										

	Indirect Cost					
	Meals and snacks	Transportation	Gasoline	Board and lodging/rental expense	Pocket money	Other costs
Mode of Payment (Daily, Monthly, One time)						
HH Member #1						
HH Member #2						
HH Member #3						
HH Member #4						
HH Member #5						
HH Member #6						
HH Member #7						
HH Member #8						
HH Member #9						
HH Member #10						

ANNEX 2: ACTUAL MONITORING INSTRUMENTS ON SCHOOL FEES²

EXTRACT FROM THE SURVEY QUESTIONNAIRES³

A. NGO Education Partnership (Cambodia) Questionnaire on School Fees

Daily Cost

Spending Items	Child 1	Child 2	Child 3	Child 4	Child 5	Child 6
School fee						
Teacher fees						
Private tutoring						
Food						
Parking						
Transport/Gasoline						
Other						

Frequent Cost

Spending Items	Child 1	Child 2	Child 3	Child 4	Child 5	Child 6
Exam forms						
Lesson handout						
Study materials						
Class materials						
Present for teacher						
Bike/Motorbike						
Ceremonies						
Others						

Uniforms

Spending Items	Child 1	Child 2	Child 3	Child 4	Child 5	Child 6
Student Uniform						
Sports Uniform						
Shoes/Sandal						
ID Cards						
Others						

Satchels and Learning materials

² No part of the questionnaires in the annexures can be used or reproduced without the written permission from the Asia South Pacific Association for Basic and Adult Education (ASPBAE).

³ The complete set of survey questionnaires used in the EdWatch studies is available upon request from ASPBAE.

Spending Items	Child 1	Child 2	Child 3	Child 4	Child 5	Child 6
Satchels/bags						
Notebooks						
Reading books						
Exercise books						
Pens, pencils, rulers						
Book cover						
Others						

Registration

Spending Items	Child 1	Child 2	Child 3	Child 4	Child 5	Child 6
Registration forms						
Form filling						
Photo						
Student's record						
Plastic cover						
Garbage						
Electricity						
Sports						
Others						

B. E-Net Philippines Questionnaire on School Fees

Households with members 3-24 years old and currently attending school were asked these questions on education expenditure. Each row corresponds to spending data for each individual attending school.

EDUCATION											
(1D)		FOR 3-24 YEARS OLD									
		(28) What and how much did ____ spend on education this past year/12 months?									
N U M B E R	Write down the first name of each member before proceeding	(28A)	(28B)	(28C)	(28D)	(28E)	(28F)	(28G)	(28H)	(28I)	(28J)
		Tuition fee	Text-books/Supplementary	School supplies	Uniform/School clothes	Sports fees	Other school related fees/contributions	Transportation cost	Private tutors	Packed meals/snacks/food	Others
	NAME (FIRST NAME)									1. YES 2. NO	
1											
2											
3											
4											
5											
6											
7											
8											
9											
10											

C. Campaign for Popular Education (CAMPE) Bangladesh Survey of Expenditure in Education

(To collect Information from parents/guardian)

Name of the Student (Selected through process): _____

Group (applicable for students of class IX and X only): Science (1), Humanities (2), Commerce (3)

Class: _____ Male (1) Female (2); Religion: Muslim (1), Hindu (2), Budhdha (3), Christian (4)

Ethnicity: Bengali (1), Ethnic Minority (2)

2. Name of the parent/guardian: _____ Male (1)/Female (2);

Occupation: _____ Average Income of the household: Tk. _____

Total Member of the household: Male: _____ Female: _____ Total: _____

3. Agriculture Land (in Decimal); ____; House and Other Land (Deci): _____ Total (Deci): _____

4. Other household assets (please mention the numbers): (a) Table/Chair _____ (b) Cot/couch _____

(c) Blanket/quilt _____ (d) Wrist Watch/Wall clock/Table clock _____ (e) Radio/Television _____

f) Bicycle _____ (g) Ceiling Fan _____ (h) Motorcycle _____

5. Expenditure for the above mentioned student:

Main Expenditure	Amount in Taka	
	1 January – 31 December (Year 1)	1 January – 31 July (Year 2)
1. Tuition Fees		
2. Admission Fee		
3. Other Fees		
4. Private Tutor		
5. Books		
6. Exercise Book, Pen, Pencil, Rubber, Ink, Geometry Box, etc.		
7. School Bag and Umbrella		
8. School Dress and Shoes		
9. Conveyance/Transports (Commute to School & Private Tutor's House)		
10. Tiffin		
11. Entertainment		
12. Medical		
13. Fuel and Electricity		
14. Others, if any (e.g. Computer)		

Filled in by:

Name and Signature of parent/Guardian:

Supervisor's Name and Signature:

Signature:

Date:

Date:

Date:



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Learning Beyond Boundaries

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