



LSMS GUIDEBOOK

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Measuring Household Expenditure on Education

A Guidebook for designing household survey questionnaires

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ABOUT LSMS

The Living Standards Measurement Study (LSMS), a survey program housed within the World Bank's Development Data Group, provides technical assistance to national statistical offices in the design and implementation of multi-topic household surveys. Since its inception in the early 1980s, the LSMS program has worked with dozens of statistical offices around the world, generating high-quality data, developing innovative technologies and improved survey methodologies, and building technical capacity. The LSMS team also provides technical support across the World Bank in the design and implementation of household surveys and in the measurement and monitoring of poverty.

ABOUT THIS SERIES

The LSMS Guidebook series offers information on best practices related to survey design and implementation. While the Guidebooks differ in scope, length, and style, they share a common objective: to provide statistical agencies, researchers, and practitioners with rigorous yet practical guidance on a range of issues related to designing and fielding high-quality household surveys. The Series aims to achieve this goal by drawing on the experience accumulated from decades of LSMS survey implementation, the expertise of LSMS staff and other surveys experts, and new research using LSMS data and methodological validation studies.

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ABBREVIATIONS AND ACRONYMS

DHS	Demographic and Health Survey
EPDC	Education Policy and Data Center
HBS	Household Budget Surveys
IHSN	International Household Survey Network
IIEP	International Institute for Educational Planning
ISCED	International Standard Classification of Education
LSMS	Living Standards Measurement Study
MICS	Multiple Indicator Clustery Survey
NEAs	National Education Accounts
NGO	Non-Governmental Organization
NSO	National Statistics Office
OECD	Organisation for Economic Co-operation and Development
PTA	Parent-Teacher Association
SDGs	Sustainable Development Goals
SMC	School-Management Committee
UIS	UNESCO Institute for Statistics
UOE	UNESCO-OECD-Eurostat
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNICEF	United Nations Children's Fund
USAID	United States Agency for International Development

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EXECUTIVE SUMMARY

This Guidebook is intended to be a reference for survey practitioners seeking guidance on designing and implementing household surveys that include measurement of education expenditure. Household education expenditures are often included in consumption-based poverty and inequality measures and are a critical input in monitoring the main education financing indicator (4.5.4) of the Sustainable Development Goals (SDGs). Furthermore, information on individual education expenditure allows for micro-econometric research on intrahousehold resource allocation, which can provide useful insight into policy and program designs. However, despite the importance of household education expenditure, the data in many developing countries are often missing or incomplete, making it difficult to link household education expenditure to other economic indicators.

Education expenditures are collected in a wide variety of surveys, including Living Standards Measurement Studies (LSMS) surveys, Household Budget Surveys (HBS), Multiple Indicator Cluster Surveys (MICS), Demographic and Health Surveys (DHS), and others. These surveys differ in scope and face unique constraints, but adoption of a consistent methodology across all would present new opportunities for collection of comprehensive expenditure data on education and make comparisons over time and across countries easier. This Guidebook highlights important considerations and best practices for designing and implementing a module for collecting high-quality household education-expenditure data.

Item list

Perhaps the most critical consideration when collecting data on household education expenditure is what elements/items of expenditure to capture. At the minimum, all expenditures incurred by individual members of the household for the purpose of formal education should be recorded (at a disaggregated level to allow for item-specific analysis). It is recommended that for each school-attending member of the household, surveys obtain individual information for each of the listed items, since accuracy tends to be greater if respondents are asked about the items individually. A “not allocable” category should be included to allow respondents to respond even if they are not able to disaggregate all spending for each school-attending member of the household. It is also important to separate education-expenditure items paid directly to education institutions from those that are incurred outside the school (but are required for the purpose of attending school). Thus, the item list should allow for better comparability of household education expenditure over time and across countries, reflect national realities, and facilitate the integration of data produced from a household survey within a broader education-expenditure analysis framework.

Level of Reporting, Age Range, and Respondent

Another important design and implementation decision that must be made is whether to collect education-expenditure information at the individual or the household level. Collecting education-expenditure information at the individual level is likely to result in better data, with more accurate reporting by respondents. It also requires less cognitive effort for respondents to provide information on education expenditure for each individual attending school during the reference period, rather than for all individuals in total. Education-expenditure data collected at the individual level also makes it possible to link expenditures to other individual-level characteristics (sex, age, grade attended, etc.), greatly enhancing the analytical possibilities. Thus, irrespective of the survey type, it is highly recommended that education-expenditure information be collected at the individual level, for all members of a household who attended school in the reference school year.

Ideally, surveys will consider all individuals when collecting information on education and corresponding expenditures. All members of a household should be asked whether they attended school in the reference school year, and additional details should only be collected if they attended. The ideal respondent is the person who is most familiar with education expenditures for individuals in the household. Given that information is collected at the individual level, parents or guardians who make educational payments may be best placed to provide information for children, while adults could provide expenditure information for themselves, where applicable.

Recall Period

When collecting information on education expenditures, the recall or reference period used should be carefully chosen. The recall period is the timeframe during which the respondent is asked to remember and report spending on household members' education. The period should be determined so that it (1) is comprehensive enough to estimate expenditures over a certain period, typically a year; (2) reflects the periodicity of the expenditure; (3) reflects the school year calendar; and (4) considers the length of the survey period. The recall period should be such that the data collected will allow for the calculation of annual estimates of household expenditure on education, bearing in mind that some expenditures are incurred throughout the school year, while others are incurred only once during the school year. Thus, the baseline recall period should be a full 12 months.

For countries that run a three-term academic calendar system, if the survey occurs after the end of the second term, then attendance and expenditure information should be collected for the current school year, while the last completed school year should be referenced if the survey occurs within the first two terms. For countries that operate a two-term academic calendar system, however, the last completed school year should be used if the survey occurs within the first semester, while the current school year should be used if the survey occurs after the first term. However, households should be asked about any expected additional expenditures for the remainder of the school year if the current school year is referenced. For extended surveys, such as those that span more than one school year and where households are interviewed in different school years, two options are recommended. It is important to ask households about the school year completed prior to the commencement of the survey or about the most recently completed school year, bearing in mind that the reference school year may have been switched during the course of the survey. It is important to determine when this switch was made.

For recurring expenditure items (e.g., transportation, school meals), it is appropriate to shorten the recall period to one month, while for other items (e.g., tuition fees) the recall period should be the school year. Recurrent expenditure items can be annualized at the analysis stage using an appropriate scaling factor.

I. Introduction

I.1 OVERVIEW

Private household expenditure on education forms a critical component of education expenditure in many developing countries. For example, households fund about one-quarter of education expenditure in Viet Nam, one-third in Côte d'Ivoire, half in Nepal, and more than half in Uganda (UIS, IIEP, & Pôle de Dakar, 2016). However, information on household education expenditure in these countries is often missing or incomplete, making it difficult to thoroughly assess the link between household education expenditure and other economic indicators. Information on household education expenditure can be ascertained from different sources, such as line items in the accounts of public or private educational institutions that show income from households, or surveys based on samples of households.

To ensure that information on household education expenditure is captured at all levels and for all countries, the UNESCO Institute for Statistics (UIS) collects data on educational expenditure from all UNESCO member states in its annual Survey of Formal Education. The UIS questionnaire is designed to collect internationally comparable education-expenditure¹ data for all levels of formal education by source of funding (government, international, private), destination, and type of expenditure. Private funding includes funding by households as well as other private entities such as corporations, religious organizations, and local NGOs. However, the coverage of household funding for education collected through the UIS survey is very low, as few countries are able to provide the data needed. This is either because no such data have been collected at the national level, or because the data were collected in a manner that makes it difficult to use them for analysis by education stakeholders or for reporting at the international level in a comparable manner. Moreover, for countries that provide information on household financing, the sources of

such information are unclear, as are the completeness and reliability of such data.

Gaps in household education-expenditure data collected from countries using the UIS standardized survey can, in theory, be filled with information from national household surveys. Although there are many nationally representative household surveys that collect information on education, they are primarily tailored to meet national data needs and often do not collect sufficient information to effectively monitor education expenditure. Moreover, they often use different methodologies, thus making comparisons over time and across countries difficult (UIS, 2017). Therefore, there is a need for international guidelines on how to design an education-expenditure module for household surveys.

This Guidebook discusses best practices for collecting information on education expenditure in household surveys. Expenditure information is critical for assessing the direct cost of education to households and its influence on the overall well-being of the household. Such an assessment will be a valuable input for policymakers when making evidence-based decisions. This Guidebook is intended to provide a standardized set of guidelines to foster the harmonization of education-expenditure data in future household surveys, and to ensure that the data collected are more easily comparable across surveys and countries and are sufficiently comprehensive while acknowledging country-specific needs. This Guidebook is designed to provide guidance to national statistics offices (NSOs) and any other agencies or institutions implementing national surveys that monitor multiple dimensions of well-being or education, specifically.

¹ See questionnaire UIS/ED/B “Educational Expenditure (ISCED 0-8)” at <http://uis.unesco.org/uis-questionnaires>

1.2 REASONS FOR COLLECTING BETTER EDUCATION-EXPENDITURE DATA

Collecting accurate and complete information on household education expenditure is essential since it is an input for several important analyses (Box 1).

- I. Education expenditures are often included in consumption-based poverty and inequality measures, which are still the standard measure of progress for many developing countries. A well-implemented education-expenditure module within a nationally representative household survey can ensure that education is properly represented in the poverty estimation. Thus, the education-expenditure share of total household consumption (and subsequently, the poverty estimates) would not be over or underestimated.
- II. The main financing indicator of the Sustainable Development Goals (SDGs) and the SDG4-Education 2030 thematic framework is education expenditure per student by level of education and source of funding (SDG indicator 4.5.4). Since household funding is a major part of total education funding in many countries, it is essential to collect the data to produce a complete version of the indicator. The cost incurred by households in educating school-age children, at different levels of enrollment, can be derived from individual-level education-expenditure data. Accurate information on education expenditure by households is also needed for National Education Accounts (NEAs), which provide a comprehensive overview of education financing flows in a country (IIEP, UIS, & Pôle de Dakar, 2016).
- III. Information on individual education expenditure allows for micro-econometric research on intrahousehold resource allocation, which can provide useful insight into policy and program designs. For instance, with education-expenditure information captured at the individual level, coupled with other complementary individual variables such as sex, it will be possible to understand whether households spend significantly more on boys than girls or vice versa, for different levels of enrollment. Further, it will be possible to conduct a comparative analysis of the impact of household education expenditure on male and female enrollment using individual- and household-level data. The analysis can be further extended across countries, regions, and time, as well as different income cohorts.

BOX 1 — USES OF EDUCATION-EXPENDITURE DATA

Consumption-Based Poverty Estimates

Consumption-based poverty compares household aggregate-consumption expenditure to a pre-defined poverty line. Over a reference period, household consumption-expenditure items (food and non-food—including education expenditures) are aggregated into a single monetary value. Data on these expenditure items are generally collected together in a single nationally representative household survey. Thus, a well-implemented education-expenditure module is vital in accurately estimating consumption-based poverty in the developing world.

Sustainable Development Goals

Measuring progress toward attaining SDG indicator 4.5.4 depends largely on the availability of good-quality education-expenditure data at the individual level. Given the international nature of the SDGs, having a set of standard guidelines that allows for the collection of uniform education data at the individual level of the household is critical.

Micro-Econometric Analysis and Policy Research

Education-expenditure data, especially those collected at the individual level, allow for micro-level analysis of intrahousehold education spending across gender and grade levels. Collection and analysis of such data will also help focus public education-expenditure policy in a way that addresses these deficits in household spending on education.

National Education Accounts

A National Education Account (NEA) is a systematic and comprehensive framework to analyze education financing flows in a country. It covers all levels of education (from pre-primary to tertiary), all sources of funding (government, private, and external), and all providers of education (public and private). With an NEA, it is possible to examine how much is spent on education in a country, where funding comes from, and how it is allocated. This information can be used to guide national education policy and to compare education financing across countries.

2. Current Surveys and Data Availability

The UNESCO Institute for Statistics (UIS) analysed 99 nationally representative household surveys to determine the ease of use and reliability of household surveys for the calculation of household education-expenditure indicators (UIS, 2017). The analysis covered the comprehensiveness of the expenditure items included, the separation or merging of collected items, the level at which expenditure data were collected, and the recall period used. While all surveys addressed the education-expenditure topic, not every national survey collected data on the complete range of expenditure items or the minimum expenditure items for which households are expected to incur expenses if one or more household members are in school. The characteristics of these surveys may render the collected data less useful for the production of comparable education-expenditure indicators across countries and over time.

UIS also examined the International Household Survey Network (IHSN) Gender Data Navigator, a tool for screening the content of 1,986 surveys and censuses (as of 2013, the year of the inventory) carried out in low- and middle-income countries.² Of the 1,986 surveys, 1,181 contain data on current school attendance, and an even smaller number of surveys provide information on the current level and grade attended (947 and 645 respectively). When considering the availability of expenditure data alone, regardless of data on attendance, 501 surveys collected information on tuition spending, 396 on textbooks, 233 on uniforms and clothing, and 291 on other education materials. Only 131 of the 1,986 surveys and censuses, listed in Annex 1, include information on current school attendance and the level of education, in addition to the four spending items mentioned above. These numbers demonstrate the scarceness of surveys that collect information necessary for the calculation of education-expenditure indicators.

In addition, there are conceptual and practical issues associated with survey data collection (UIS, 2011a). From a conceptual perspective, it is difficult to define the precise limits of what can be considered household spending on education. Further, although payments to schools can clearly be considered an education expenditure, other types of expenditures may be more difficult to categorize, and certain complementary expenditures should not be considered spending on education.

The recall period during which the data on education expenditures are collected can also affect the usability and reliability of household surveys. Despite their general reliability and the fact that they collect information on a broader category of items, household surveys are potentially unreliable because information on spending is based on respondents' recollection and a varying understanding of what constitutes expenditure on education (UIS, 2011a).

In conclusion, education expenditures are collected in a wide variety of surveys, including Living Standards Measurement Study (LSMS) surveys, Household Budget Surveys (HBS), and others. Box 2 lists some survey programs—each with a different scope and specific constraints—and describes the extent to which they collect information on education expenditure. In many cases, education is not a priority for data collection and the best practices identified in this Guidebook may not be viable for all surveys. The recommendations that follow attempt to take this diversity into account.

² The IHSN Gender Data Navigator is available at <http://datanavigator.ihsn.org>

BOX 2 — HOUSEHOLD SURVEYS

LSMS

The Living Standards Measurement Study (LSMS) is a household survey program housed within the World Bank's Development Data Group that provides technical assistance to National Statistics Offices (NSOs) in the design and implementation of multi-topic household surveys. Since its inception in the early 1980s, the LSMS program has worked with dozens of statistics offices around the world in generating high-quality data, incorporating innovative technologies and improved survey methodologies, and building technical capacity. The LSMS surveys are generally nationally and sub-nationally representative in the countries of operations, with household education expenditure being a critical component of the topics covered in these surveys. The LSMS surveys follow pretty much the same standard across countries, notwithstanding country-specific data needs.

DHS

The Demographic and Health Survey (DHS) is the flagship program of the United States Agency for International Development (USAID) mandated to produce household survey data on topics such as population, health, and nutrition. Globally, the program operates in more than 90 countries and emphasizes the statistical capacity building of NSOs in the design and implementation of surveys, as well as data analysis. Though the focus of the DHS is on population, health, and nutrition, education is one of the modules covered—but while it captures information on individual members' school attendance within a reference school year, the education-expenditure information might not be disaggregated by individual members. Moreover, education-expenditure information might not be disaggregated into the desired minimum components as described in this Guidebook.

HBS

Household Budget Surveys (HBSs) are nationally representative household surveys with a focus on consumption expenditure. For most low- and middle-income countries, HBS is the main data source for poverty estimation and consumer price index weights calculation. The periodicity of this survey varies across countries in terms of frequency, timing, content, and structure. While this survey provides valuable information on household-consumption expenditure, education expenditure is mostly at the household level, with less focus on individual members' school attendance.

MICS

Multiple Indicator Clusters Surveys (MICS) are an initiative of UNICEF to collect data on women and children. The initiative, which was first launched in 1995 and implemented in more than 60 countries, now has about 5 to 6 rounds of survey data, depending on the country. UNICEF provides financial, technical, and methodological support, while the NSOs conduct the survey, ensuring strong collaboration and national ownership of the collected data. MICS surveys provide no data on education expenditures; however, in the sixth round of MICS, the education module contains questions about education-related social transfers received by households.

3. List of Education-Expenditure Items

3.1 PRINCIPLES

Perhaps the most critical consideration when collecting education-expenditure data is what elements of expenditure should be captured. Education expenditures should be collected separately for a series of education-related expense items (tuition fees, books, uniforms, etc.). The item list suggested in Table 2 has the following purposes:

1. Better comparability over time and between countries. The suggested item list follows international norms and standards on education expenditure, such as the UNESCO-OECD-Eurostat (UOE) framework for data collection on education, which defines what should or should not be considered as household expenditure on education for comparability purposes (UIS, OECD, & Eurostat, 2016).
2. Degree of flexibility so that the list can reflect national realities. While the survey should aim to capture all household expenditures linked to formal education attendance, other expenditures such as music and painting classes, and other extra-curricular activities can be included—but they should be recorded separately so that they can be excluded when comparing data between countries.
3. Integration of data produced from a household survey within a broader education-expenditure analysis framework. The framework used is that of National Education Accounts (NEA) (IIEP, UIS, & Pôle de Dakar, 2016), which is a comprehensive methodology to collect, process, and analyse education expenditure from all sources of funding: the government, the private sector (including households), and other external sources. This implies, among other things, separating payments made directly to schools from those made outside, and ensuring that transfers between sources of funding (such as scholarships or financial aid) are adequately captured. Such features permit better integration with other data sources and help avoid doublecounting.

Following these principles when identifying the list of education-expenditure items to be collected will encourage the broader use of data from the survey, including the production of education-expenditure indicators such as those of the SDG4—Education 2030 framework. The objective is to capture everything that fits under the scope of household expenditure on education. Additional items can be collected, as long as they do not overlap with items that fall under the definition of household expenditure on education so that those additional items can be easily excluded for the calculation of comparable indicators.

3.2 SCOPE OF HOUSEHOLD EXPENDITURE ON EDUCATION

The scope should include, at a minimum, *all expenditures incurred by members of a household on formal education*. These include direct expenses (e.g., tuition and other required fees), as well as the costs of textbooks, learning materials, uniforms, and attending private classes or paying a tutor to help with the official school curriculum. Formal education is described in the International Standard Classification of Education (ISCED) as institutionalised, intentional, and planned through public organizations and recognized private bodies. Formal education consists mainly of initial education; however, vocational education, special-needs education, and some types of adult education are often recognized as being part of the formal education system (UIS, 2011b).

Expenses incurred on non-formal education may be included under certain conditions (see Box 3), but the section on school attendance should specify that the individual is not attending formal education.

BOX 3 — TREATMENT OF NON-FORMAL EDUCATION IN EDUCATION-EXPENDITURE DATA COLLECTION

According to the International Standard Classification of Education (UIS, 2011b), international data-collection exercises on education (censuses, surveys, mappings, etc.) are mainly focused on formal education. Yet, the recognition of learning through non-formal education has become more common in many countries during the past decade. Non-formal education is education that is institutionalized, intentional, and planned by an education provider; but it does not necessarily follow a continuous pathway like formal education. It is considered an addition, alternative, and/or a complement to formal education. For statistical comparability purposes, a clear distinction should be made between data on formal and non-formal education. Non-formal education data collection should focus on programs leading to qualifications that are recognized as formal or equivalent to formal by the relevant national education authorities.

Due to the heterogeneity of non-formal education programs, it is difficult to provide general guidelines for data-collection instruments that aim at international comparability (UIS, 2011b). Table I, adapted from UNICEF and UIS (2015), presents an attempt to categorize the core types of non-formal education programs by identifying those that can be considered equivalent to formal education for the purpose of expenditure data collection and use.

Table I — Core Types of Non-Formal Education Programs and Their Correspondence to Formal Education

Types of non-formal education programs/activities	Leading to formal education or not
Early childhood education: Care and education services for young children from birth to the age of entry into primary education, as defined by the country.	Yes: For children of pre-primary school age only.
Literacy: Organized primarily to impart the ability to identify, understand, interpret, create, communicate, and compute, using printed and written materials associated with varying contexts.	No: Usually targets adult population.
Equivalency schooling: Organized primarily for children and youth who do not have access to or dropped out of formal primary/basic education; typically aims to provide an alternative to formal primary/basic education, as well as mainstream children and youth into the formal system upon successful completion of the program.	Yes: Second-chance programs, typically condensed or accelerated.
Life-skills training: Programs and activities organized to impart abilities to better function in daily life and to improve society (e.g., health and hygiene, HIV/AIDS prevention).	No
Income generation training/non-formal vocational training: Training in income-generating productive service skills and trades, also referred to as livelihood training, with the aim of increasing productivity and income.	No: Usually targets adult population.
Rural development: Education, training and extension services carried out in rural communities primarily to promote development by improving agricultural practices, animal husbandry, and natural resource management (e.g., water, soil, and forestry).	No: Usually targets adult population.
Further education/professional development: Advanced educational and training opportunities for learners who have acquired a particular level of education; can include specialized courses such as computer and language training.	No: Usually targets adult population.
Religious education: Organized learning about religion held in churches, mosques, temples, synagogues and other places of worship.	No: Unless the curriculum is similar to other schools in the national education system and is officially recognized as equivalent to formal school.
Cultural/traditional education: Cultural or traditional/ indigenous educational activities.	No

Following international standards, such as the UOE and NEA frameworks, household education expenditure should include the following:

- I. Household payments to educational institutions:
 - a. Tuition fees
 - b. Other fees charged for educational services (such as registration fees, laboratory fees, or examination fees)
 - c. Fees paid for ancillary services provided to students by educational institutions, such as for boarding/student housing, meals, transport organized by schools, or health services
 - d. Contributions to parent-teacher associations, school-management committees, or any sort of “school fund” or “parent contribution fund” paid to the school
 - e. Cash estimates of in-kind contributions to schools (such as if parents are asked to contribute pens, paper, chairs, paint, or other materials to the school)
- II. Household payments for educational goods and services purchased outside educational institutions:
 - a. Payments required for school attendance, for example:
 - i. School uniforms and other required clothing (e.g., for physical education)
 - ii. School books and teaching materials
 - iii. Other required purchases, such as athletic equipment, materials for arts lessons, etc.
 - b. Payments not required for school attendance, but *nonetheless linked to participation in the education program*, for example:
 - i. Extra classes or private tutors linked to the official curriculum
 - ii. Transport to and from school or canteen fees, where these services are not provided through educational institutions
 - iii. Additional books, computer, or learning software to be used at home in support of formal schooling

In determining what should or should not be included as a household education expenditure, the main criterion should

be: *Would the expenditure have been incurred if the individual had not attended school?* If the answer is ‘yes’, it should not be included. For example, extra music, arts, language, or other leisure classes not linked to the official curriculum should not be included, and if they are, they should be recorded in a separate category to make comparability between countries easier. Similarly, the general living expenses of students are not considered education expenditures and should not be included, as they would be incurred whether or not the student attends school. Nonetheless, if students have to pay fees for meals or boarding to educational institutions, these expenses *are included* under expenditures on education.

Undefined “other” categories should be avoided, since without precision as to what can or cannot be included, there is a risk that respondents will include expenses that should not be considered expenditures on education. Respondents should be encouraged to report expenditures according to the type of classification shown in Table 2, even if they are rough estimations. To allow respondents to respond even if they are not able to disaggregate all spending, a ‘not allocable’ category can be added, but with the instruction that it should only include expenditures that fall under the education domain described, and *that would fall under one or more of the categories listed* (i.e., not an ‘other expenses’ category). In cases where a respondent cannot disaggregate any of the amounts, total expenditure could be entered in the ‘not allocable’ category.

3.3 GROUPING OF ITEMS

Surveys should obtain information on the listed items separately, without grouping, since accuracy tends to be greater if respondents are asked about separate items. Some surveys where household consumption was measured on a detailed level using a large number of items produced more accurate estimates than those with a smaller number of questions collecting information on a less detailed level (United Nations, 2005). In cases where the list of items is too long, some of the items may be merged into a single question to reduce the survey execution time. The contents of each group should be clearly defined—first in the questionnaire, then in the manuals for field personnel, and finally in a basic information document that accompanies the data release into the public domain. Specifically, during training of field personnel, the contents of the groups should be emphasized, so that they are conveyed to the respondents during the interviews.

Table 2 shows two alternative classifications of the items that should be included in the education-expenditure section of a household survey. The “minimum” list covers the essential elements of household education expenditure matching the

Table 2 — List of Education-Expenditure Items to Include in a Household Survey

Minimum list	More detailed optional list
<i>Payments to educational institutions</i>	
Tuition and other fees (e.g., exam, registration fees)	Tuition fees Exam, registration, and other official fees
Other contributions to school (PTA, SMC, school fund, in-kind contributions)	Contribution to parent-teacher associations and/or school-management committees Contribution to construction, maintenance, or other school funds Cash estimates of in-kind contributions
Ancillary fees (boarding, canteen, transport, health services)	School canteen fees School boarding fees Fees for transport organized by the school Fees for health services
<i>Payments and purchases outside educational institutions, required for school attendance</i>	
Uniforms and other school clothing	Uniforms and other school clothing
Textbooks and other teaching materials	Textbooks and other teaching materials (stationery, etc.) Other required purchases (such as computer, extra books, athletic equipment, material for arts lessons, other school-related expense specific to the country)
<i>Payments and purchases outside educational institutions, not required for school attendance</i>	
Private tutoring	Private tutoring
School meals and transport purchased outside educational institutions	Transport to and from school not organized by the school School meals purchased outside school
Additional books, computer, or learning software to be used at home in support of formal schooling	Additional books, computer, or learning software to be used at home in support of formal schooling
<i>Optional separate items (not included in international comparison and NEA)</i>	
Other categories (music and art lessons, gifts, extra-curricular activities, etc.)	Music and art lessons Gifts Extra-curricular activities Not allocable (but fitting within the listed items)

international UOE and NEA frameworks, allowing for comparability between surveys and countries. If judged relevant to national interests or to increase the accuracy of what is reported, individual surveys may specify some of the items listed under the “more detailed optional list” separately, in the survey questionnaire.

The minimum list could also be a feasible alternative for frequent surveys, as a survey conducted every year may not require collection of information of the detailed optimal list of items in every single year. In such cases, the condensed list could be implemented regularly, and the extended list, occasionally. As mentioned earlier, countries can modify the list to suit their national context. For example, in some countries school uniforms and textbooks are paid directly to educational institutions rather than purchased outside the institution, therefore, these items will be included under payments to educational institutions.

3.4 SOURCE OF EDUCATION FUNDS

Another important aspect of education finance is the source of the funding, in particular whether the household has received financial support from outside the household for the education of its members. For example, it is recommended that information on scholarships and cash transfers, either unconditional or conditional on attending school, be captured. To allow for integration with data from other sources of funding (such as government expenditure), the source of the funding should also be specified. Without that information, the data will be very hard to use.

Respondents should be asked whether groups or individuals outside the household contributed funds to support the education of household members, and if yes, they should specify which category the funds fall into and how much was received in the recall period:

1. Scholarships, financial aid, cash or in-kind³ transfers contingent on student status, or vouchers received from government ministries or agencies
2. Scholarships, financial aid, cash or in-kind transfers to attend school received from NGOs or faith-based organizations
3. Cash or in-kind support to attend school received from individuals outside of the household living in the country
4. Cash or in-kind support to attend school received from individuals living abroad (remittances).

3 The value of all in-kind transfers should be estimated in the local currency.

4. Level of Reporting

4.1 LEVEL OF REPORTING – INDIVIDUAL

One of the most important design decisions that must be made is whether to collect education-expenditure information at the individual or the household level. Some surveys, such as LSMS types, collect education-expenditure information at the individual level, while others like HBS collect such information at the household level (usually as a line item in non-food expenditure modules). The recommended level of reporting in these guidelines is at the individual level, irrespective of the survey type. Collecting expenditure information at the individual level is likely to result in more accurate reporting by respondents and therefore, better data. It will be easier and will require less cognitive effort for respondents to provide information on education expenditure for each individual attending school rather than for all individuals in total. Collecting this information at the individual level also allows the expenditures to be linked to other individual-level characteristics (sex, age, grade attending, etc.), thereby enhancing the analytical possibilities. Thus, irrespective of the survey type, it is highly recommended that education-expenditure information be collected at the individual level.

This should ensure that the expenditure items discussed in Section 3 are collected, at least at the desired disaggregated level. This works best when the expenditure questions are part of a typical education module, where information is collected on everyone above a certain age in the household. Thus, at the individual level, complementary variables such as enrollment, sex, age, etc. can be collected to facilitate linking the expenditure information to other individual-level variables.

4.2 AGE RANGE

In education modules, there is often a lower bound (e.g., 3 years) and sometimes an upper bound for the age group of targeted respondents. For instance, the DHS typically collects attendance information only for individuals between the ages of 5 to 24. However, restricting the age range can lead to loss

of information for individuals outside that range who have incurred education expenditures. Ideally, all individuals should be asked whether they are currently attending school in the reference school year; and if the response is yes, then additional questions can be asked. This will automatically restrict the sample to relevant individuals and thereby not overburden the survey or prevent omission of relevant information. If an age range is imposed, it should take into consideration the reference period/school year to avoid excluding any individuals who may have aged out of the range in the period between the reference school year and the interview date. For example, if the age range is 3 to 24 years old, then eligible individuals should have been between 3 and 24 years old during the reference period/school year. If the reference school year was one year before the interview period, then the age range can be shifted to include those currently between 4 and 25 years of age.

4.3 RESPONDENT

The person who provides the information on education expenditure is critically important. As for other indicators, the ideal respondent is the person who is most familiar with the education expenditures for specific individuals in the household. Given that the information is collected at the individual level, parents or guardians who make the payments may be best suited to provide information for children, while adults could provide expenditure information for themselves. However, if the adults themselves are not responsible for the education expenditures, then whoever is paying should respond on their behalf. The best respondents in each household may not always be available due to constraints on time and the number of visits; regardless, the respondent-selection priorities and procedures must be well documented in the survey manual.

5. School Attendance

In addition to education expenditures, information on school attendance is necessary for the calculation of SDG 4.5.4. This makes it possible to identify the relevant sample for which education expenditures should be calculated and to allocate expenditures to individual levels of education. Required information includes:

- School attendance status for the reference academic year
- The individual's level of education
- The type of school the individual was attending (public or private).

5.1 DATA-COLLECTION PRACTICES IN EXISTING SURVEYS

Existing household surveys identify “school attendance” in different ways. Annex 2 presents several examples of questions used to capture school attendance in different surveys, including Living Standards Measurement Study (LSMS) surveys, Demographic and Health Surveys (DHS), and Multiple Indicator Cluster Surveys (MICS). While some surveys focus on attendance at the time of the interview, thereby excluding individuals who may have attended earlier in the school year but dropped out before the interview, others consider attendance at any time during the school year. In the latter case, dropout during the current school year is ignored since individuals who may have dropped out at some point are still identified as attending.

In most surveys, there is no minimum number of attendance days required during the reference period to qualify as attending.

It is important to note that some surveys refer to school enrollment as opposed to attendance. The discrepancy between those who are enrolled and those who actually attend school represents a group that is de facto out-of-school, for which little or no expenditures have been incurred.

The reference period for identification of attendance also varies across surveys. Surveys focusing on attendance at the time of the interview do not usually specify any reference period. Some other surveys refer to attendance during the “present year” and although they may implicitly mean the current school year, this can be confusing for respondents who could misinterpret the question as referring to the current calendar year. It is important to clearly specify the period of interest, be it a school year or another period, as it is necessary to help respondents and future users of the data understand what exactly is measured.

Other surveys consider either the current school year and specify the corresponding years in the question (e.g., “2017-2018”), or they consider the past 12 months. Depending on when the survey is administered, the past 12 months may cover two different academic years, during which an individual may have attended two different levels of education (e.g., primary and lower secondary), thus capturing expenditures of a different nature and amount. This could complicate the estimation of the expenditures per level of education for that particular individual.

A few surveys focusing on attendance during the current school year also include information about attendance in the previous year. This approach is interesting as it provides a more complete picture of the individual's attendance status and makes it possible to calculate indicators such as the dropout rate or repetition rate.

5.2 RECOMMENDATIONS FOR SCHOOL ATTENDANCE DATA COLLECTION

Harmonizing the wording of education questions in future surveys is essential for data quality and comparability. The recommended approach for efficient estimation of school attendance consists of the use of two main questions: one on

attendance during the current school year and one on attendance during the previous school year. These recommendations are close to those formulated by the Education Policy and Data Center in its comparative analysis of the education questions in 30 household surveys (EPDC, 2009). This approach, used in MICS surveys, allows for the collection of information on attendance status over a longer period, and will likely match most expenditure data-recall periods. Combined with information on the level and grade attended during the two consecutive years of interest, these questions can also be used to calculate promotion, repetition, dropout, and survival rates.

5.2.1 Attendance status

Below are additional recommendations to ensure the complete harmonization of attendance status questions:

1. Questions should focus on attendance instead of enrollment.
2. Questions should cover attendance at any time during the school year in to account for all persons that attended, including drop-outs. This should be done for the current and previous school years. With this approach, dropouts can be estimated by comparing attendance during the previous school year with attendance during the current school year.
3. Attendance information should be collected for all household members, regardless of age, to achieve full coverage of all education levels, from pre-primary to tertiary education.
4. It is essential to clearly define the academic year of reference in each question (e.g., 2017-2018) to avoid any misinterpretation, especially when the interview takes place at the end of a school year or at the beginning of another. If interviews are carried out at a time when no classes are held, the school year of interest should be the one immediately preceding school holidays to ensure that answers relate to actual, and not intended, attendance (EPDC, 2009).
5. School attendance should refer to participation in formal education. Moreover, as mentioned above, attendance should include participation at all educational levels, including pre-primary education and early childhood

educational development.⁴ If information on participation in non-formal education (e.g., religious schooling) is collected, this should be clearly identified to allow distinction from participation in formal education.⁵

5.2.2 Level of education and grade attended

It is essential to record the grade and level of education of every household member reported to be attending school during the reference period. This allows for the disaggregation of education expenditures by level of education, which is a requirement for SDG indicator 4.5.4. This information must be collected for all household members attending any educational institution, including pre-primary education, regardless of whether expenditure data are collected at the household or individual level.

5.2.3 Type of school

The type of school attended by household members (public or private) is an important question that should also be included in survey education modules, so that education expenditures can be differentiated by the type of school the student is attending. The response categories could be more detailed depending on the survey's requirements and the specificities of each national system, but it is important to be able to combine them in a way that allows the distinction between government schools and other types of institutions. That way, the relative cost of public and private schooling can be assessed; another element for calculation of SDG indicator 4.5.4. This information should be collected at the individual level. The set of recommended questions to capture school attendance is summarized in Table 3.

⁴ For the purpose of this data collection, only early childhood programs with an educational component that meet the criteria for ISCED Level 0 specified in the International Standard Classification of Education (UIS, 2011b) are considered.

⁵ It should be noted that data collection on non-formal education is notoriously difficult, notwithstanding efforts addressed in the NFE-MIS Handbook (UNESCO, 2005).

Table 3 — Recommended Set of Questions for Capturing Attendance in the Current and Previous School Year

Type of school attendance	Questions
Current attendance	At any time during the current school year (YYYY-YYYY) did (name) attend school or any Early Childhood Education program? <i>If the answer is YES:</i> During this current school year: - What level is (name) attending? - What grade is (name) attending? - What type of school is (name) attending
Previous year attendance	At any time during the previous school (YYYY-YYYY) year did (name) attend school or any Early Childhood Education program? <i>If the answer is YES:</i> During that previous school year: - What level did (name) attend? - What grade did (name) attend? - What type of school did (name) attend?

6. Recall Period

When collecting information on education expenditure, the recall or reference period used should be carefully chosen. The recall period is the period of time for which the respondent is expected to report spending on the education of household members. The period determined should be such that (1) is comprehensive enough to estimate expenditures over a specified period, typically a school year; (2) reflects the periodicity of the expenditure, (3) reflects the school-year calendar; and (4) considers the length of the survey period.

6.1 COMPREHENSIVENESS

The baseline concern when establishing the recall period is to ensure that the information collected is representative of education expenditure over a certain period. In most cases, the intended use of education-expenditure data is to calculate *annual* expenditures. The recall period should therefore encompass all education expenditures incurred during a 12-month period, and thus should include expenses incurred during and outside of the school year. Since some education expenditures are not incurred on a continuous basis, shortening the recall period could result in their omission. For example, fees for registration, uniform, and education materials are usually paid at the start of the school year, while transportation and school meals are paid all year long. If the recall period was shortened to 6 months and that 6-month period did not include the start of the school year, then expenditure information collected during that 6-month period would not fully represent total annual education expenditures. Therefore, *the baseline recall period for collecting annual education expenditures should cover a full 12 months.*

6.2 SCHOOL-YEAR RECALL

Although education expenditures are usually calculated on an annual basis, a recall period of the previous 12 months is not ideal since it will, more often than not, cover more than one school year. A recall period that spans multiple school years makes it difficult for respondents to differentiate between

school years, since they must determine the share of expenditures that falls into each year. Therefore, *the optimal recall period is the school year*—as defined by the educational system within each country. This recall period will help respondents provide the most accurate information without requiring them to do too many calculations. In addition, the school year has a more definitive bound at either end since there is typically a break between school years. This more salient bound will help to limit any telescoping effects and better ensure that no expenses from outside the reference period are included.

Another advantage of school-year recall is that expenditures can be clearly attributed to a single grade and a single type of school. As highlighted in Section 5, these are important factors when assessing education expenditure within the country. If the use of “previous 12 months” covers two school years, it will be much more difficult to differentiate expenditures by grade (and potentially, school type), since multiple years imply a change in class or grade.

6.3 SURVEY PERIOD

The time of year and length of the survey period are also critical when deciding on the recall period for education expenditures. The time of year of the survey implementation, relative to the school year, is particularly important. *When an interview is conducted in the middle of a school year, the recall period should be the previous school year.* This is to ensure that the full range of expenses that occur throughout the year are captured. If the current school year is referenced, then expenses incurred in the second half the school year will not be accounted for.

One drawback to this method is that it can significantly extend the recall period further into the past, making it more difficult for respondents to accurately remember expenditures. *In cases where the survey period is conducted closer to the end of the school year, it might be feasible to reference the current school year and to include a question about expected expenses*

in the remainder of the school year. Additionally, if recurrent expenses are collected over a shorter recall period, then it could be possible to extrapolate expenses that will occur in the remainder of the school year.

6.3.1 Extended Survey Periods

The recall period is especially difficult to manage for longer surveys with period spans of more than one school year. In such cases, when asking about the “previous school year,” the reference school year might be different depending on when the household was interviewed. There are two options for dealing with longer surveys:

Option 1: The respondent can be asked about the school year *completed prior to the beginning of the survey period*. This will maintain a consistent reference period for all households interviewed. However, as the survey progresses, the length of the recall becomes longer, which will make it more difficult for households later in the survey to think back to the school year completed prior to the start of the survey period.

Option 2: The respondent can simply be asked about the most recently completed school year. Under this option, the reference school year will not be the same for the entire sample and at a certain point in the survey, will switch dramatically once a school year is completed. However, under this method the information collected will likely be more accurate since households interviewed later in the survey will not have a very long recall.

Whichever option is used, the correct reference period must be clearly documented and conveyed to the interviewers (during training) and the respondents. Under Option 2, a clear protocol must be established to determine at which point in the survey period the reference school year changed.

When using the previous school year as the recall period, it is imperative that questions on school attendance also reference the previous school year. Many existing surveys only ask whether the individual is *currently* attending school, however, current attendance is not relevant for expenditures incurred during the previous school year. In this case, both current and previous year attendance should be collected.

6.4 PERIODICITY

Although the baseline recall should cover expenses over a 12-month period, it might be ideal to shorten the recall period for recurring expenditure items. These are costs that the household/individual pays frequently (e.g., transportation

and meals). Depending on the frequency and periodicity of the expenses, a year-long recall may be difficult for a respondent to estimate, while a shorter recall (e.g., a month) would be easier. Box 4 lists different expenditure items discussed in Section 3 and identifies which expenditures are expected to be recurrent, along with a recommendation for a recall period for the item. Note that the local situation can vary from country to country.

While it will likely be easier for respondents to recall recurrent expenditures over a shorter period, there are also advantages to keeping the recall period uniform across all education expenditures. Different recall periods would require the respondent to mentally switch between recall periods and thus potentially impact accuracy. To mitigate this risk, the expenditure items should be grouped according to their recall period, and the recall periods used should be kept to a minimum. Two recall periods, typically school year and one month, should be sufficient in accounting for differences in the periodicity of expenditures.

Another consideration when using a shorter recall period is how to scale up monthly expenses to an annual amount. For example, some monthly expenditure items may only occur during the school year and so it would be incorrect to multiply the amount by 12 to arrive at the annual estimate. In this case, the monthly expenditures should instead be multiplied by the number of months in the school year. One solution is to include a question that asks how many months it took the household to pay these expenditures. The monthly expenditures can then be multiplied by this number to arrive at the annual estimate.

Lastly, the shorter recall period for some expenditure items could raise the potential for “telescoping” by respondents (Beegle et al, 2012). Telescoping is a phenomenon where respondents include expenditures outside of the reference period, since it is sometimes difficult for respondents to have a clear bound for the start of the period.

BOX 4 — PERIODICITY OF EXPENDITURE ITEMS		
	Expenditure Item	Recall period
1	Tuition fees	School year
2	Exam, registration, and other official fees	School year
3	Contribution to parent-teacher associations and/or school-management committees	School year
4	Contribution to construction, maintenance, or other school funds	School year
5	Cash estimates of in-kind contributions	School year
6	School canteen fees	1-month
7	School boarding fees	School year
8	Fees for transport organized by the school	1-month
9	Fees for health services	School year
10	Uniforms and other school clothing	School year
11	Textbooks	School year
12	Other teaching materials, stationery	1-month
13	Computer and software	School year
14	Transport to and from school, not organized by the school	1-month
15	School meals purchased outside school	1-month
16	Music and art lessons, including supplies	School year
17	Gifts	1-month
18	Extra-curricular activities	School year
19	Not allocable (but fitting within the listed items)	School year

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Annex I:

List of Surveys Potentially Usable for Calculation of Household Expenditure Indicators

Country	Year	Title
Angola	2000	Inquérito aos Agregados Familiares sobre Despesas e Receitas 2000
Angola	2008	Inquérito Integrado sobre o Bem-Estar da População 2008-2009, IDR II e MICS III
Albania	2002	Living Standards Measurement Survey 2002 (Wave I Panel)
Albania	2008	Living Standards Measurement Survey 2008
Albania	2012	Living Standards Measurement Survey 2012
Bangladesh	2000	Household Income and Expenditure Survey 2000
Bosnia and Herzegovina	2001	Living Standards Measurement Survey 2001 (Wave I Panel)
Bosnia and Herzegovina	2004	Living Standards Measurement Survey 2004 (Wave 4 Panel)
Belize	2001	Living Standard Measurement Survey 2001
Bolivia	2000	Encuesta Continua de Hogares 2000, MECOVI
Bolivia	2001	Encuesta Continua de Hogares 2001, MECOVI
Bolivia	2002	Encuesta Continua de Hogares 2002, MECOVI
Bolivia	2005	Encuesta de Hogares 2005
Bolivia	2006	Encuesta de Hogares 2006
Bolivia	2008	Encuesta de Hogares 2008
Bolivia	2009	Encuesta de Hogares 2009
Bolivia	2011	Encuesta de Hogares 2011
Bolivia	2012	Encuesta de Hogares 2012
Bolivia	2013	Encuesta de Hogares 2013
Bolivia	2014	Encuesta de Hogares 2014
Brazil	2002	Pesquisa de Orçamentos Familiares 2002-2003
Brazil	2008	Pesquisa de Orçamentos Familiares 2008-2009
Botswana	2009	Core Welfare Indicators Survey 2009-2010, Poverty Survey
Côte d'Ivoire	2002	Enquête sur le Niveau de Vie des Ménages de Côte d'Ivoire 2002
Côte d'Ivoire	2008	Enquête sur le Niveau de Vie des Ménages 2008
Cameroon	2007	Troisième Enquête Camerounaise Auprès des Ménages 2007

Colombia	2007	Encuesta de Calidad de Vida de Bogotá 2007
Colombia	2008	Encuesta de Calidad de Vida 2008
Colombia	2010	Encuesta Nacional de Calidad de Vida 2010
Colombia	2011	Encuesta Multipropósito para Bogotá Distrito Capital 2011
Colombia	2011	Encuesta Nacional de Calidad de Vida 2011
Colombia	2012	Encuesta longitudinal de Protección Social 2012
Cabo Verde	2007	Questionário Unificado de Indicadores Básicos de Bem-Estar 2007
Ecuador	2005	Encuesta Condiciones de Vida 2005-2006
Ecuador	2011	Encuesta Nacional de Ingresos y Gastos de Hogares Urbanos y Rurales 2011-2012
Ethiopia	2000	Welfare Monitoring Survey 2000-2001 (1993 E.C)
Ethiopia	2011	Rural Socioeconomic Survey 2011-2012
Ethiopia	2013	Socioeconomic Survey 2013-2014
Gabon	2005	Enquête Gabonaise pour l'Evaluation et le Suivi de la Pauvreté 2005
Ghana	2012	Living Standards Survey 2012-2013
Guinea	2007	Enquête Légère pour l'Evaluation de la Pauvreté 2007
Guinea-Bissau	2010	Inquérito Ligeiro para a Avaliação da Pobreza 2010
Guatemala	2000	Encuesta Nacional sobre Condiciones de Vida 2000
Guatemala	2006	Encuesta Nacional de Condiciones de Vida 2006
Guatemala	2011	Encuesta Nacional de Condiciones de Vida 2011
Honduras	2004	Encuesta Nacional de Condiciones de Vida 2004
Indonesia	2000	Family Life Survey 2000
Indonesia	2003	National Socio-Economic Survey 2003, July
Indonesia	2006	National Socio-Economic Survey 2006, July
Indonesia	2009	National Socio-Economic Survey 2009, July
Jamaica	2000	Survey of Living Conditions 2000
Jamaica	2001	Survey of Living Conditions 2001
Jamaica	2002	Survey of Living Conditions 2002
Jamaica	2003	Survey of Living Conditions 2003
Jamaica	2004	Jamaica Survey of Living Conditions 2004
Jamaica	2006	Survey of Living Conditions 2006
Kiribati	2006	Household and Income Survey 2006
Kosovo	2000	Living Standards Measurement Survey 2000
Lao PDR	2002	Expenditure and Consumption Survey 2002-2003
Lao PDR	2007	Expenditure and Consumption Survey 2007-2008
Liberia	2014	Household Income and Expenditure Survey 2014-2015
St. Lucia	2005	Survey of Living Conditions and Household Budgets 2005-2006, 2nd Survey of Living Conditions
Sri Lanka	2012	STEP Skills Measurement Program 2012, Skills Toward Employment and Productivity (Wave I)
Madagascar	2001	Enquête Permanente auprès des Ménages 2001
Mali	2009	Enquête en Grappe à Indicateurs Multiples et de Dépenses des Ménages 2009

Mongolia	2002	Integrated Household Income and Expenditure Survey with Living Standards Measurement Survey 2002-2003
Mongolia	2008	Socio-Economic Survey 2008-2009
Mozambique	2008	Inquérito sobre Orçamento Familiar 2008-2009
Malawi	2013	Integrated Household Panel Survey 2013
Niger	2010	Enquête Nationale sur les Conditions de Vie des Ménages 2010-2011
Nigeria	2003	Living Standards Survey 2003, First round
Nigeria	2004	DHS EdData Survey 2004
Nigeria	2009	DHS EdData Survey 2010
Nigeria	2013	General Household Survey, Panel 2012-2013, Wave 2
Nicaragua	2001	Encuesta Nacional de Hogares sobre Medición de Niveles de Vida 2001
Nicaragua	2005	Encuesta Nacional de Hogares sobre Medición de Niveles de Vida 2005
Nicaragua	2009	Encuesta Nacional de Hogares sobre Medición de Niveles de Vida 2009
Pakistan	2005	Social and Living Standards Measurement Survey 2005-2006
Panama	2003	Encuesta de Niveles de Vida 2003
Panama	2008	Encuesta de Niveles de Vida 2008
Peru	2002	Encuesta Nacional de Hogares 2002
Peru	2003	Encuesta Nacional de Hogares 2003
Peru	2004	Encuesta Nacional de Hogares 2004
Peru	2005	Encuesta Nacional de Hogares sobre Condiciones de Vida y Pobreza 2005
Peru	2006	Encuesta Nacional de Hogares sobre Condiciones de Vida y Pobreza 2006
Peru	2007	Encuesta Nacional de Hogares sobre Condiciones de Vida y Pobreza 2007
Peru	2008	Encuesta Nacional de Hogares sobre Condiciones de Vida y Pobreza 2008
Peru	2009	Encuesta Nacional de Hogares sobre Condiciones de Vida y Pobreza 2009
Peru	2010	Encuesta Nacional de Hogares sobre Condiciones de Vida y Pobreza 2010
Paraguay	2000	Encuesta Integrada de Hogares 2000-2001
Paraguay	2003	Encuesta Permanente de Hogares 2003
Paraguay	2004	Encuesta Permanente de Hogares 2004
Paraguay	2007	Encuesta Permanente de Hogares 2007
Paraguay	2009	Encuesta Permanente de Hogares 2009
Paraguay	2010	Encuesta Permanente de Hogares 2010
Sierra Leone	2011	Integrated Household Survey 2011
El Salvador	2000	Encuesta de Hogares de Propósitos Múltiples 2000
El Salvador	2001	Encuesta de Hogares de Propósitos Múltiples 2001
El Salvador	2002	Encuesta de Hogares de Propósitos Múltiples 2002
El Salvador	2003	Encuesta de Hogares de Propósitos Múltiples 2003
El Salvador	2004	Encuesta de Hogares de Propósitos Múltiples 2004
El Salvador	2005	Encuesta de Hogares de Propósitos Múltiples 2005
El Salvador	2006	Encuesta de Hogares de Propósitos Múltiples 2006
El Salvador	2007	Encuesta de Hogares de Propósitos Múltiples 2007
El Salvador	2008	Encuesta de Hogares de Propósitos Múltiples 2008

El Salvador	2009	Encuesta de Hogares de Propósitos Múltiples 2009
El Salvador	2010	Encuesta de Hogares de Propósitos Múltiples 2010
El Salvador	2011	Encuesta de Hogares de Propósitos Múltiples 2011
São Tomé and Príncipe	2000	Enquête sur les Conditions de Vie des Ménages 2000
Swaziland	2010	Household Income and Expenditure Survey 2009-2010
Thailand	2010	Household Socio-Economic Survey and Village/Community Fund Survey 2010
Tajikistan	2003	Living Standards Survey 2003
Tajikistan	2013	Jobs, Migration, Skills and Consumption Survey 2013
Timor-Leste	2001	Survey of Living Standards 2001
Timor-Leste	2007	Survey of Living Standards 2007 and Extension 2008
Tonga	2009	Household Income and Expenditure Survey 2009
Turkey	2001	Household Income and Consumption Expenditures Survey 2001
Tanzania	2007	Household Budget Survey 2006-2007
Tanzania	2012	National Panel Survey 2012-2013, Wave 3
Uganda	2004	Northern Uganda Baseline Survey 2004
Uganda	2010	National Panel Survey 2010-2011
Uganda	2011	National Panel Survey 2011-2012, Wave III
Uganda	2012	National Household Survey 2012-2013
Vietnam	2006	Household Living Standards Survey 2006, 5th round
Vietnam	2008	Household Living Standards Survey 2008, 6th round
Vanuatu	2010	Household Income and Expenditure Survey 2010
Yemen	2005	Household Budget Survey 2005-2006
South Africa	2008	National Income Dynamics Study 2008, Wave 1
South Africa	2010	National Income Dynamics Study 2010-2011, Wave 2
Zambia	2010	Living Conditions Monitoring Survey VI 2010
Zimbabwe	2011	Poverty Income Consumption and Expenditure Survey 2011

Annex 2:

Questions Capturing School Attendance in Selected Household Surveys

Surveys	Current attendance	Previous year attendance
Ethiopia 2015 Socioeconomic survey, Lao PDR 2007 Expenditure and Consumption Survey, Colombia 2010 Encuesta Nacional de Calidad de Vida	Is (name) currently attending school?	N/A
Nigeria 2015-2016 GHS Panel Survey	Is (name) presently in school (2015-2016 school year)?	N/A
Sierra Leone 2003 Integrated Household Survey, Comores 2003 Enquête Intégrale auprès des Ménages	Did (name) attend school/any institution at any time during the past 12 months?	N/A
Ghana 2009 Socioeconomic Panel	Did (name) attend school/college/any institution at any time during the past 12 months? Is (name) still in school?	N/A
Tajikistan 2009 Living Standard Survey	N/A	Did you enrol in an educational institution last academic year (2008-2009)?
Honduras 2004 Encuesta Nacional de Condiciones de Vida	Enrolled in any educational institution this current year?	Enrolled in any educational institution during the previous year?
Armenia 2009 Integrated Living Conditions Survey	Does (name) attend an educational institution?	Did (name) attend an educational institution last academic year?
MICS 6th round	At any time during the current school year did (name) attend school or any Early Childhood Education program?	At any time during the previous school year did (name) attend school or any Early Childhood Education program?
DHS phase 7 (2013-2018)	Did (name) attend school at any time during the [2014-2015] school year?	N/A

Annex 3

Recommended Education Expenditure Survey Module

Two modules for data collection on household education expenditure are presented in this Annex. Module A should be used if the reference period is the last completed school year, while Module B should be used if the emphasis is on the current school year. For surveys that occur at the end of a school year or at the beginning of a new school year, the recall period should generally be the *previous* school year, and thus Module A is recommended. On the other hand, if the survey occurs toward the end of the school year, Module B is recommended. Module B captures both already-incurred expenses as well as expected expenses for the current school year.

Given that the information is captured at the individual level, it is highly recommended that the interviewer conducts the exercise row-wise, though this might not be a problem if digital data-collection mode is used.

Q01 – Q02: The purpose of these questions is to establish the respondent who is providing information for [NAME]. If the person on the line item is the one responding, then the interviewer must record 1 for Q01 and skip to Q03. Otherwise, the interviewer should record 2 in Q01 and proceed to Q02 to provide the ID of the person responding to the questions on behalf of [NAME]. The household roster will serve as a guide in providing the ID of the respondent. It is highly recommended that adults respond for themselves where possible, while parents/guardians respond on behalf of children.

Q03 – Q04: These questions are designed to separate the individuals into those who have attended school and those who have not. Attendance does not mean that any level was completed. It should also be noted that the term “school” includes Quranic/Islamic schools and adult education. If the individual has never attended school, then the interviewer should choose NO for Q03 and proceed to Q04, to establish the main reason why the individual has never attended school. Once the reason has been established, the interviewer must move the next person in the household.

Q05: This question captures the highest level and/or grade of education that was SUCCESSFULLY completed by the individual. The options in this question must be modified to suit the grade/level of the education system in the reference country. For instance, for those who are enrolled in school, if they are currently in Lower Secondary School grade 3, then the highest *grade* completed will be Lower Secondary School grade 2. It must be noted that *grade* applies to primary and secondary education, while *level* applies to post-secondary and tertiary education. The options must be expanded further to exhaust all possible grades/levels of education in the reference country. For instance, primary will have 6 grades, and thus should be expanded to include primary 1, primary 2, ..., primary 6.

Q06: Qualification means certification of successful completion of an education program or stage of a program. That is, the respondent has passed all necessary qualifying examinations and coursework at that grade/level and has obtained the appropriate certificate for that grade/level. Here also, the options in this question must be modified to suit the grades/levels in the reference country. For consistency check, the qualification must correspond with the highest grade/level of education completed. For instance, for a person who is currently attending upper secondary school grade 3, the highest education qualification attained will be lower secondary school certificate.

Q07 – Q09: These questions capture current school attendance of the individual, though the information for expenditure is captured for the [LAST SCHOOL YEAR]. If the individual is currently attending school for the [CURRENT SCHOOL YEAR], then ask for the grade/level in which he/she is attending for the [CURRENT SCHOOL YEAR] in Q08. In Q09, ask for the organization that runs the school that the individual is currently attending for the [CURRENT SCHOOL YEAR].

Q10 – Q11: These questions ask about the individual's attendance of school during the [LAST COMPLETED SCHOOL YEAR]. If the individual did not attend school in the [LAST COMPLETED SCHOOL YEAR], then Q10 solicits the main reason why the person did not attend school for the reference school year. Once the reason for not attending school during the [LAST COMPLETED SCHOOL YEAR] has been established, the interviewer must move to the next person. Note: [LAST COMPLETED SCHOOL YEAR] should be replaced with actual year (e.g., 2018/2019) during the field implementation.

Q12: This question asks for the level or grade the individual attended during the reference school year. Note that the level or grade attended for the reference school year cannot be below the highest level or grade completed, especially when this question is asked during regular school periods (not vacation periods). Again, the options in this question must be modified to reflect the educational grades/levels of the reference country. Even if the individual is not attending school for the reference school year, but has been registered in a class at the school, then the grade/level in which the person has registered to attend should be recorded.

Q13: This question will establish the institution that operates the school that the individual is attending in the reference school year. A school can be run by the government, a private entity, or some religious body, depending on the country. Here also, the options can be modified to reflect the institutions that run schools in the survey-implementing country. The organization/entity that runs the school will have implications for the cost of education to the individual, since it costs more to obtain education in private schools than public schools in most low- to middle-income countries.

Q14 – Q15: These questions seek to find out the main means of transportation by which the individual goes to school, and how long it takes the individual to get to the school using the specified means of transport. The means of transport and the distance from an individual's dwelling to school has implications on the person's sustained presence in the school. Some individuals might mainly walk to school; others might use the bus or some commercial means of transportation. Q13 is a single response question so the main means of transport is required. The means of transport is considered "main" if that is the method used for most/all of the journey on most days. The time it takes to travel from home to school (one way) must be recorded in minutes for Q14.

Q16 – Q18: These questions seek to determine if the individual received a scholarship for the reference school year. The total amount of the scholarship and the institution/organization providing the scholarship should be solicited. The interviewer should ask for an official document (if any) and copy out the amount where possible, for Q17. If the individual has a scholarship that spans more than one school year, the amount to be entered for Q16 should refer to the reference school year only. If the person has two scholarships of different amounts from different entities during the reference school year, then the sum of the amounts received must be calculated and recorded in Q17, while the agency/institution from whom the highest scholarship amount was received should be selected for Q18.

Q19: This set of questions is intended to determine education expenses for each household member who was or is in school at any time during the reference school year. These expenditures may be in cash or in kind, and include all amounts spent since the beginning of the reference school year. When the individual is unsure of the amount, the interviewer should probe and, if possible, ask for an approximate value and enter it in the appropriate column. In most cases, the authorities of the school will send the parent/guardian a fee schedule, so the interviewer can ask for it and copy out the expenses under each category, provided the individual has already paid that amount. It must be emphasised, however, that this fee schedule is for the whole school session up to the present time (where the [CURRENT SCHOOL YEAR] reference period is used), and not for one school term only.

Categories A – S: If expenditure for an individual can be fully given for categories A – S and the values are known for all of these categories, then the amounts should be recorded in the appropriate column. If there was no expenditure in any category, then 0 should be entered in that category. Note that for expenditure items A – F, the information should be collected per month, while for G – S, they should be collected for the entire year.

Category T: This category should be used when the respondent cannot individually identify the areas of education expenditure or cannot allocate education expenditure to individual categories. That is, the respondent only knows the expenditure as a lump-sum value. The lump-sum value should be placed in category T. If the respondent is able to provide expenditures for the individual categories, then the aggregate is not necessary.

ADDITIONAL QUESTIONS IN MODULE B

Q7 – Q9: These rationale for these questions are the same as Q07 – Q09 in Module A, except that those here refer to the previous school year.

Q20 – Q21: These capture any additional education expenses that the individual expects to incur besides those provided in the previous question. These questions are important especially if the survey occurs during the school year, at a time when some expenses might not have been incurred yet.

MODULE A

FOR ALL HOUSEHOLD MEMBERS

INDIVIDUAL ID	1.	2.	3.	4.	5.	6.	7.	8.
	IS [NAME] ANSWERING FOR HIMSELF/HERSELF? YES..1 (▶ Q3) NO...2	WHO IN THE HOUSEHOLD IS RESPONDING ON BEHALF OF [NAME]? COPY ID FROM ROSTER ID CODE	Has [NAME] ever attended school? YES..1 (▶ Q5) NO...2	What was the main reason [NAME] never attended school? MODIFY TO SUIT COUNTRY'S CONTEXT HAD ENOUGH/COMPLETED SCHOOLING.....1 AWAITING ADMISSION.....2 NO SCHOOL..... LACK OF TEACHERS.....3 NO TIME/NO INTEREST.....4 LACK OF MONEY.....5 MARITAL OBLIGATION.....6 DOMESTIC OBLIGATION.....7 SICKNESS.....8 DISABILITY.....9 PARENTS DIVORCED.....10 DEATH OF PARENTS.....11 CONFLICT (MILITANCY/ INSURGENCY).....12 TOO YOUNG.....13 OTHERS (SPECIFY).....14 ALL RESPONSES ▶ NEXT PERSON	What is the highest educational level/ grade [NAME] has completed? MODIFY TO SUIT AND INCLUDE ALL THE COUNTRY'S EDUCATION LEVELS/ GRADES NONE.....00 PRE-PRIMARY GRADES.....10 PRIMARY GRADES.....20 LOWER SECONDARY GRADES.....30 UPPER SECONDARY GRADES.....40 POST SECONDARY NON-TERTIARY, GENERAL.....50 POST SECONDARY NON-TERTIARY, VOCATIONAL.....60 BACHELOR'S LEVELS OR EQUIVALENT.....70 MASTER'S LEVELS OR EQUIVALENT.....80 DOCTORATE LEVELS OR EQUIVALENT.....90 LEVEL	What is [NAME]'s highest education qualification attained? MODIFY TO SUIT AND INCLUDE ALL THE COUNTRY'S EDUCATION QUALIFICATIONS NONE.....0 PRIMARY CERTIFICATE.....1 LOWER SECONDARY SCHOOL CERTIFICATE.....2 UPPER SECONDARY SCHOOL CERTIFICATE.....3 BACHELOR'S DEGREE.....4 MASTER'S DEGREE.....5 DOCTORATE DEGREE.....6	Is [NAME] currently attending school for the [CURRENT SCHOOL YEAR]? YES..1 NO...2 (▶ Q10)	What level/ grade is [NAME] currently attending for or the [CURRENT SCHOOL YEAR]? NONE.....00 PRE-PRIMARY GRADES.....10 PRIMARY GRADES.....20 LOWER SECONDARY GRADES.....30 UPPER SECONDARY GRADES.....40 POST SECONDARY NON-TERTIARY, GENERAL.....50 POST SECONDARY NON-TERTIARY, VOCATIONAL.....60 BACHELOR'S LEVELS OR EQUIVALENT.....70 MASTER'S LEVELS OR EQUIVALENT.....80 DOCTORATE LEVELS OR EQUIVALENT.....90 LEVEL
1								
2								
3								
4								
5								

MODULE A

9.	10.	11.	12.	13.	14.	15.	16.	17.
What kind of organization runs the school that [NAME] is currently attending for the CURRENT SCHOOL YEAR? GOVERNMENT.....1 COMMUNITY.....2 RELIGIOUS BODY.....3 PRIVATE.....4 NGO.....5 OTHER.....6 (SPECIFY).....6	Did [NAME] attend school during the [LAST COMPLETED SCHOOL YEAR]? YES..1 (► Q12) NO...2	Why did [NAME] not attend school during the [LAST COMPLETED SCHOOL YEAR]? HAD ENOUGH/COMPLETED SCHOOLING.....1 AWAITING ADMISSION.....2 NO SCHOOL.....3 LACK OF TEACHERS.....3 NO TIME/NO INTEREST.....4 LACK OF MONEY.....5 MARITAL OBLIGATION.....6 DOMESTIC OBLIGATION.....7 SICKNESS.....8 DISABILITY.....9 PARENTS DIVORCED.....10 DEATH OF PARENTS.....11 CONFLICT (MILITANCY/INSURGENCY).....12 TOO YOUNG.....13 OTHERS (SPECIFY).....14	What level/grade did [NAME] attend during the [LAST COMPLETED SCHOOL YEAR]? NONE.....00 PRE-PRIMARY GRADES.....10 PRIMARY GRADES.....20 LOWER SECONDARY GRADES.....30 UPPER SECONDARY GRADES.....40 POST-SECONDARY, NON-TERTIARY, GENERAL.....50 POST-SECONDARY, NON-TERTIARY, VOCATIONAL.....60 BACHELOR'S LEVELS OR EQUIVALENT.....70 MASTER'S LEVELS OR EQUIVALENT.....80 DOCTORATE LEVELS OR EQUIVALENT.....90 LEVEL/GRADE	What kind of organization runs the school that [NAME] attended during the [LAST COMPLETED SCHOOL YEAR]? GOVERNMENT.....1 COMMUNITY.....2 RELIGIOUS BODY.....3 PRIVATE.....4 NGO.....5 OTHER.....6 (SPECIFY).....6	By what means of transportation did [NAME] go to school during the [LAST COMPLETED SCHOOL YEAR]? MODIFY TO SUIT COUNTRY'S CONTEXT BOARDING.....1 ► 16 FOOT.....2 BICYCLE.....3 MOTORCYCLE.....4 PRIVATE CAR.....5 TAXI.....6 BUS.....7 CAMEL/DONKEY.....8 BOAT.....9 OTHER.....10 (SPECIFY).....10	How much time did it take [NAME] to get to school during the [LAST COMPLETED SCHOOL YEAR] using the means of transportation in Q14? (in minutes) MINUTES	Did [NAME] have a scholarship during the [LAST COMPLETED SCHOOL YEAR]? YES..1 NO...2 (► Q19a)	What was the amount of the scholarship [NAME] received in the [LAST COMPLETED SCHOOL YEAR]? LC

MODULE A

Monthly expenses						
I8.	I9a.					
From which organisation did [NAME] receive the scholarship during the [LAST COMPLETED SCHOOL YEAR]? MODIFY TO SUIT COUNTRY'S CONTEXT GOVERNMENT.....1 COMMUNITY.....2 RELIGIOUS BODY.....3 PRIVATE.....4 NGO.....5 OTHER (SPECIFY).....6	How much did [NAME] spend MONTHLY on education during the [LAST COMPLETED SCHOOL YEAR] for each of the following?					
	Ancillary fees (boarding, canteen, transport, health services)		Textbooks and other teaching materials	School meals and transport purchased outside educational institutions		Other categories (music and arts lessons, gifts, extra-curricular activities, etc.)
	A. School canteen fees	B. Fees for transport organized by the school	C. Other required purchases (such as computer, extra books, athletic equipment, material for arts lessons, other school-related expense specific to the country)	D. Transportation to and from school not organized by the school	E. School meals purchased outside school	F. Gifts
	LC	LC	LC	LC	LC	LC

MODULE A

Annual expenses													
19b.													
How much did [NAME] spend IN TOTAL on education during the [LAST COMPLETED SCHOOL YEAR]?													
IF THERE WAS NO EXPENDITURE, WRITE '0' IF THE RESPONDENT CANNOT DIVIDE SCHOOL EXPENSES INTO VARIOUS CATEGORIES, THEN RECORD THE AGGREGATE EDUCATION EXPENDITURE FOR THE INDIVIDUAL IN COLUMN T, NOT ALLOCABLE													
Tuition and other fees		Other contributions to school (PTA, SMC, school fund, in-kind contributions)			Ancillary fees (boarding, canteen, transport, health services)		Uniforms and other school clothing	Textbooks and other teaching materials	Private tutoring	Additional books, computer, or learning software to be used at home in support of formal schooling	Other categories (music and arts lessons, gifts, extra-curricular activities, etc.)		NOT ALLOCABLE
G. Tuition fees	H. Exam, registration and other official fees	I. Contribution to parent-teacher associations and/or school-management committees	J. Contribution to construction, maintenance or other school funds	K. Cash estimates of in-kind contributions	L. School boarding fees	M. Fees for health services	N. Uniforms and other school clothing	O. Textbooks and other teaching materials (stationery, etc.)	P. Private tutoring	Q. Additional books, computer, or learning software to be used at home in support of formal schooling	R. Music and arts lessons	S. Extra-curricular activities	T. Not Allocable
LC	LC	LC	LC	LC	LC	LC	LC	LC	LC	LC	LC	LC	LC

MODULE B

FOR ALL HOUSEHOLD MEMBERS

	1.	2.	3.	4.	5.	6.	7.	8.
INDIVIDUAL ID	IS [NAME] ANSWERING FOR HIMSELF/HERSELF?	WHO IN THE HOUSEHOLD IS RESPONDING ON BEHALF OF [NAME]?	Has [NAME] ever attended school?	What was the main reason [NAME] never attended school?	What is the highest educational level/grade [NAME] has completed?	What is [NAME]'s highest education qualification attained?	Did [NAME] attend school during the [PREVIOUS SCHOOL YEAR]?	What level/grade did [NAME] attend during the [PREVIOUS SCHOOL YEAR]? MODIFY TO SUIT COUNTRY'S CONTEXT
	YES..1 (► Q3) NO...2	COPY ID FROM ROSTER ID CODE	YES..1 (► Q5) NO...2	MODIFY TO SUIT COUNTRY'S CONTEXT HAD ENOUGH/COMPLETED SCHOOLING.....1 AWAITING ADMISSION.....2 NO SCHOOL.....3 LACK OF TEACHERS.....3 NO TIME/NO INTEREST.....4 LACK OF MONEY.....5 MARITAL OBLIGATION.....6 DOMESTIC OBLIGATION.....7 SICKNESS.....8 DISABILITY.....9 PARENTS DIVORCED.....10 DEATH OF PARENTS.....11 CONFLICT (MILTANCY/INSURGENCY).....12 TOO YOUNG.....13 OTHERS (SPECIFY).....14	MODIFY TO SUIT COUNTRY'S EDUCATION LEVELS/ GRADES NONE.....00 PRE-PRIMARY GRADES.....10 PRIMARY GRADES.....20 LOWER SECONDARY GRADES...30 UPPER SECONDARY GRADES...40 POST SECONDARY NON-TERTIARY, GENERAL.....50 POST SECONDARY NON-TERTIARY, VOCATIONAL.....60 BACHELOR'S LEVELS OR EQUIVALENT.....70 MASTER'S LEVELS OR EQUIVALENT.....80 DOCTORATE LEVELS OR EQUIVALENT.....90	MODIFY TO SUIT COUNTRY'S CONTEXT NONE.....0 PRIMARY CERTIFICATE.....1 LOWER SECONDARY SCHOOL CERTIFICATE.....2 UPPER SECONDARY SCHOOL CERTIFICATE.....3 BACHELOR'S DEGREE.....4 MASTER'S DEGREE.....5 DOCTORATE DEGREE.....6	YES..1 NO...2 (► Q10)	LEVEL/ GRADE
1								
2								
3								
4								
5								

MODULE B

9.	10.	11.	12.	13.	14.	15.	16.	17.
What kind of organization runs the school that [NAME] is attended for the [PREVIOUS SCHOOL YEAR]? GOVERNMENT.....1 COMMUNITY.....2 RELIGIOUS BODY.....3 PRIVATE.....4 NGO.....5 OTHER (SPECIFY).....6	Is [NAME] currently attending school for the [CURRENT SCHOOL YEAR]? YES..1 (► Q12) NO...2	Why is [NAME] not attending school for the [CURRENT SCHOOL YEAR]? HAD ENOUGH/ COMPLETED SCHOOLING.....1 AWAITING ADMISSION.....2 NO SCHOOL/ LACK OF TEACHERS.....3 NO TIME/NO INTEREST.....4 LACK OF MONEY.....5 MARITAL OBLIGATION.....6 DOMESTIC OBLIGATION.....7 SICKNESS.....8 DISABILITY.....9 PARENTS DIVORCED.....10 DEATH OF PARENTS.....11 CONFLICT (MILITANCY/ INSURGENCY).....12 TOO YOUNG.....13 OTHERS (SPECIFY).....14	What level/grade is [NAME] attending for the [CURRENT SCHOOL YEAR]? NONE.....00 PRE-PRIMARY GRADES.....10 PRIMARY GRADES.....20 LOWER SECONDARY GRADES.....30 UPPER SECONDARY GRADES.....40 POST SECONDARY NON-TERTIARY, GENERAL.....50 POST SECONDARY NON-TERTIARY, VOCATIONAL.....60 BACHELOR'S LEVELS OR EQUIVALENT.....70 MASTER'S LEVELS OR EQUIVALENT.....80 DOCTORATE LEVELS OR EQUIVALENT.....90	What kind of organization runs the school that [NAME] is attending for the [CURRENT SCHOOL YEAR]? GOVERNMENT.....1 COMMUNITY.....2 RELIGIOUS BODY.....3 PRIVATE.....4 NGO.....5 OTHER (SPECIFY).....6	By what means of transportation does [NAME] go to school this [CURRENT SCHOOL YEAR]? MODIFY TO SUIT COUNTRY'S CONTEXT BOARDING.....1 ► 16 FOOT.....2 BICYCLE.....3 MOTORCYCLE.....4 PRIVATE CAR.....5 TAXI.....6 BUS.....7 CAMEL/DONKEY.....8 BOAT.....9 OTHER (SPECIFY).....10	How much time DOES it take [NAME] to go from home to school (one way) on average during the [CURRENT SCHOOL YEAR] using the means of transportation specified in Q14 (in minutes)? MINUTES	Does [NAME] have a scholarship for the [CURRENT SCHOOL YEAR]? YES..1 NO...2 (► Q19a)	What is the amount of the scholarship [NAME] received for the [CURRENT SCHOOL YEAR]? LC
		(► NEXT PERSON)	LEVEL					

MODULE B

Monthly expenses							
18.	19a.						
From which organisation did [NAME] receive the scholarship for the [CURRENT SCHOOL YEAR]? GOVERNMENT.....1 COMMUNITY.....2 RELIGIOUS BODY.....3 PRIVATE.....4 NGO.....5 OTHER (SPECIFY).....6	How much did [NAME] spend MONTHLY on education during the [CURRENT SCHOOL YEAR] for each of the following?						
	Ancillary fees (boarding, canteen, transport, health services)		Textbooks and other teaching materials		School meals and transport purchased outside educational institutions		Other categories (music and arts lessons, gifts, extra-curricular activities, etc.)
	A. School canteen fees	B. Fees for transport organized by the school	C. Other required purchases (such as computer, extra books, athletic equipment, material for arts lessons, other school-related expense specific to the country)	D. Transportation to and from school not organized by the school	E. School meals purchased outside school	F. Gifts	
	LC	LC	LC	LC	LC	LC	

MODULE B

Annual expenses													
19b.													
How much did [NAME] spend IN TOTAL on education during the [CURRENT SCHOOL YEAR] for the following items?													
IF THERE WAS NO EXPENDITURE, WRITE '0' IF THE RESPONDENT CANNOT DIVIDE SCHOOL EXPENSES INTO VARIOUS CATEGORIES, THEN RECORD THE AGGREGATE EDUCATION EXPENDITURE FOR THE INDIVIDUAL IN COLUMN T, NOT ALLOCABLE													
Tuition and other fees		Other contributions to school (PTA, SMC, school fund, in-kind contributions)			Ancillary fees (boarding, canteen, transport, health services)		Uniforms and other school clothing	Textbooks and other teaching materials	Private tutoring	Additional books, computer, or learning software to be used at home in support of formal schooling	Other categories (music and arts lessons, gifts, extra-curricular activities, etc.)		NOT ALLOCABLE
G. Tuition fees	H. Exam, registration and other official fees	I. Contribution to parent-teacher associations and/or school-management committees	J. Contribution to construction, maintenance or other school funds	K. Cash estimates of in-kind contributions	L. School boarding fees	M. Fees for health services	N. Uniforms and other school clothing	O. Textbooks and other teaching materials (stationery, etc.)	P. Private tutoring	Q. Additional books, computer, or learning software to be used at home in support of formal schooling	R. Music and arts lessons	S. Extra-curricular activities	T. Not Allocable
LC	LC	LC	LC	LC	LC	LC	LC	LC	LC	LC	LC	LC	LC

MODULE B

	Monthly expenses					
20.	21a.					
Does [NAME] expect to incur additional expenses for the [CURRENT-SCHOOL-YEAR]?	How much more does [NAME] expect to spend MONTHLY on education during the [CURRENT SCHOOL-YEAR] for each of the following items?					
YES.. I NO...2 (► NEXT PERSON)	Ancillary fees (boarding, canteen, transport, health services)		Textbooks and other teaching materials	School meals and transport purchased outside educational institutions		Other categories (music and arts lessons, gifts, extra-curricular activities, etc.)
	A. School canteen fees	B. Fees for transport organized by the school	C. Other required purchases (such as computer, extra books, athletic equipment, material for arts lessons, other school-related expense specific to the country)	D. Transportation to and from school not organized by the school	E. School meals purchased outside school	F. Gifts
	LC	LC	LC	LC	LC	LC

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