

Factors Affecting the Financing of Higher Education: Exploring the Experiences of the University of the West Indies and the University of Technology, Jamaica

Yükseköğretimin Finansını Etkileyen Faktörler: Jamaika'da Teknoloji Üniversitesi ve Batı Hint Adaları Üniversitesi Deneyimleri

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Abstract

The paper examines some of the primary factors impacting the revenues of the University of the West Indies (UWI), Mona and the University of Technology (UTECH), Jamaica. These include government contribution, student enrolment, loan availability, student support facilities and their programme renewal and income-generating strategies. In a period where government is reducing its allocation to the Universities, enrolment continues to increase; and both universities are focused on providing new and revised programmes while engaged in income-generating activities. Currently, UWI has had more success than UTECH in the income-generating type of activities. The availability of students' loan which is the central source supporting student tuitions is uncertain in the face of a continuing economic decline. Consequently, the universities have had to expand their internal support facilities for students. With the two universities pursuing similar programme options, an atmosphere of competition has been established in the pursuit of alternative funding, higher visibility and greater credibility.

Keywords: Financing higher education, student enrolment, student loan, tuition, income generating activities

Öz

Bu makale, Mona'da yer alan Batı Hint Adaları Üniversitesi (BHAÜ) ve Teknoloji Üniversitesi'nin (TÜ-Jamaika) gelirlerini etkileyen temel faktörlerden bazılarını incelemektedir. Bunlar arasında devlet katkısı, öğrenci kayıtları, kredi uygunluğu, öğrenci destek tesisleri ve program yenileme ve gelir getiren stratejiler yer almaktadır. Hükümetin üniversitelere ayrılan payı azalttığı bir dönemde, öğrenci kayıtları artmaya devam etmektedir ve her iki üniversite de gelir getirici faaliyetlerde bulunurken yeni ve revize programları sağlamaya odaklanmıştır. Şu anda, Batı Hint Adaları Üniversitesi gelir getirici faaliyetlerde Teknoloji Üniversitesinden daha başarılı olmuştur. Öğrenci öğrenim ücretlerinin desteklenmesinde temel kaynak olan öğrenci kredilerinin uygunluğu, devam eden ekonomik gerileme karşısında belirsiz durumdadır. Bunun sonucunda, üniversiteler kendi içlerinde yer alan öğrenci destek tesislerini genişletmek zorunda kalmıştır. Benzer program seçeneklerini benimseyen iki üniversite ile alternatif finansman, daha yüksek görünürlük ve daha fazla güvenilirlik arayışı içerisinde bir rekabet ortamı oluşturulmuştur.

Anahtar sözcükler: Yükseköğretimin finansmanı, öğrenci kayıtları, öğrenci kredisi, öğrenim ücreti, gelir getirici faaliyetler

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Introduction

Universities, both public and private, are facing significant challenges in light of the world economic crisis. For the public universities, the Jamaican government has advanced a policy of rebalancing the funding of education by reducing its allocation for higher education. For example, the University of the West Indies (UWI) campus at Mona “has been asked to operate on a budget for the 2010/2011 academic year that is 28.5% less than what was approved for expenditure during the 2009/2010 academic year” (Alleyne, 2010, p. 1). Establishing the basis for changing its funding emphasis, the previous Minister of Education, Andrew Holness, said that “government spends \$14 billion annually on tertiary institutions, which cater to 60,000 students, but only \$2 billion on the early childhood sector with 150,000 children, and \$10 billion on the primary level with 250,000 students” (Observer, 2010). While these numbers seem to show the disproportionate nature of the funding of the education system, the reality is that the activities at the tertiary level cannot be compared with the other levels in terms of cost, immediate national impact, and complexity. The time schedule for this massive reduction is uncertain, but it means simply that universities in the public sector will have to find new ways of meeting their annual budgets. In fact, the target set by government stipulated that the Universities will be responsible for 30% of the cost of higher education, at least for the UWI, Mona. Using the government’s subvention for 2009, if the amount allocated was 30% of the University’s income, the current allocation would reduce to J\$3.24 from J\$5.90B. The University would therefore be responsible for raising J\$2.66B from other sources. The Minister of Education signalled that the reduction would have been gradual, but no timeline has been presented. Certainly, a cut of 28.5% in a single calendar year is not gradual. For many institutions, the immediate response would be to reduce significantly its programmatic activities and cut staff in order to reduce costs; however, the UWI has “accelerated the process of transforming its operations to eke out efficiencies where possible and move towards achieving greater self-sustainability” (Alleyne, 2010, p. 1).

Conceptual Framework

The funding of tertiary education is usually done through five basic sources: (a) government, (b) parents and family members, (c) students, (d) donors, and (e) tertiary institutions (Gordon, 2010). In Jamaica, the government provides up to 80% of tuition for public tertiary education, which amounts to J\$11B in the 2009/2010 estimates of expenditure (Ministry of Finance and the Public Service, 2009). The remaining 20% is the responsibility of the students. This model emanated from a policy framework in the 1970s which provided free tuition for student pursuing tertiary education in public institutions (Nkrumah-Young, Huisman, & Powell, 2008). With a worsening economic situation, universities are being called on to play a greater role in the funding of education (Davies, 2005). This has resulted in universities participating in (a) income-gen-

erating activities, (b) establishing endowments, and (c) attracting donations in order to fill the gap created by the reduction of funding support by the state (McGregor, 2008). But the basis for the state continued role in the funding higher education is well established. Woodhall (2007), for example, pointed to the fact that there is also a social benefit when the population acquires higher education.

Recognizing the need for broadening the funding base for higher education, Hutton (2013) proposed a model which would share the burden among central government, the university, private sources and the student loan facility. With student loan targeted to absorb the funding gap created by the reduction of government contribution, an income-contingent repayment policy has been proposed to ease the repayment challenges such schemes are facing (Barr, 2005). So the combination of a progressive student loan policy and the broadening of the funding base is recognition that there must be a shared responsibility, which is linked to the social and private benefits of education. Alongside the issue of funding, the size and the quality of the workforce have implications for student enrolment in universities. For example, UNESCO (2003) pointed out that it would require between 40% and 50% of the workforce to have university training in order to achieve adequate economic development. It means that student enrolment in universities must continue to increase even in the face of government reduction in funding support, challenges faced by students in funding university education, and the need for the universities to reposition their operations to manage the exigencies which confront them.

In seeking to understand the threats faced by the reduction of government's funding to UWI and UTECH, a number of areas which influenced or are affected by the issue of funding were examined. These include (a) student enrolment, (b) government funding of the education system, (c) government funding of the two universities, (d) student assistance programmes, (e) the role of the Student Loan Bureau (SLB), and (f) strategies implemented by the universities to address both their academic programme and revenue challenges.

Student Enrolment Patterns at UTECH and UWI

The UTECH has pursued an aggressive approach to the recruitment of students to that institution. Between 2004 and 2009, its enrolment moved from 9,677 to 11,227 (see Table 1). This represents an increase of 16.02% over the period. In fact, it proposed a target of 5,000 additional students by 2012 given additional space in Western Jamaica (Reid, 2009). This would increase enrolment to over 16,000 students. In 2007, the UWI, Mona campus had projected an enrolment of up to 22,000 students by 2012 (UWI Strategic Committee, 2007). This target seemed to have receded into the background due mainly to its new approach to online training, space constraints and general lack of funding to implement the expansion of facilities and provide the requisite staff. The enrolment of UWI for 2009/10, stood at 15,262. With enrolment

in 2003/4 at 13,490, the increase over the period was 13.14%. Overall the pattern of enrolment shows a rate of increase that is in favour of UTECH.

Table 1. Enrolment pattern for UTECH from 2004/05 to 2008/9

Enrolment	2003/ 2004	2004/ 2005	2005/ 2006	2006/ 2007	2007/ 2008	2008/ 2009	Total
No. of Places not Taken up	1503	1344	1388	1351	1865	2799	10250
No. W/D* and or D/R*	667	221	448	683	500	936	3455
Total Excluded from UTECH	2110	1565	1833	2034	2365	3735	13642
Final Enrolment	9677	8412	9055	9326	9725	11227	
<i>No. Excluded as a % of Enrolment</i>	<i>21.80</i>	<i>18.60</i>	<i>20.24</i>	<i>21.81</i>	<i>24.32</i>	<i>33.27</i>	<i>23.34</i>

W/D Withdrew, D/R Deregistered; N/A Not Available

Note. Data compiled from the Economic and Social Survey of Jamaica, PIOJ between 2003/4 and 2008/9 and the Office of Finance, UTECH. (Also note that Information for UTECH was available only for the period covered.)

Table 2. Enrolment Pattern for UWI from 2005/06 to 2009/10

Enrolment	2005/ 2006	2006/ 2007	2007/ 2008	2008/ 2009	2009/ 2010	Total
No. Offered Places	6440	6719	6570	7749	7102	34580
No. of Places not Taken up	2488	1535	878	1190	1387	7478
No. W/D and or D/R * <i>(estimated)</i>	160	170	198	23	15	406
Total Excluded from UWI	2648	1705	1076	1213	1402	8044
Final Enrolment	15398	15412	14573	14414	15262	
No. Excluded as a % of Enrolment	17.19	11.06	7.38	8.42	9.19	10.65

*W/D Withdrew, D/R Deregistered

Note. Information compiled from data provided by Mona Information Technology Services (MITS) and the Office of the Bursar, UWI. (Also note the information for UWI was available only for the period covered.)

The increase in enrolment should be consistent with the desirable national goal of increasing the number of university graduates with the competence to make a difference in the economic activities of the country. However, the level of enrolment is affected mainly by the number of students not taking up places awarded, withdrawals and deregistering by the Universities. This is irrespective of the fact that only 6,208 or 18% of those who sat CSEC² in 2009 had the qualification to matriculate into a tertiary institution (PIOJ³, 2009). For UTECH, the combined figures for withdrawals and

¹ Caribbean Secondary Examination Certificate is a regional secondary school examination administered by the Caribbean Examinations Council.

² Planning Institute of Jamaica

deregistration ranged from 18% to 33% of final enrolment. Further, the highest number of students excluded from UTECH as a percentage of enrolment occurred in 2008/09. While a myriad of factors could account for this reduction, students' ability to meet the financial cost would be an important one (Paterson & Gordon, 2010).

The picture of enrolment and student exclusion at UWI is somewhat different from UTECH's, even taking into consideration the fact that the period covered by the data presented is not the same. Table 2 shows a gradual reduction in the number of students excluded from UWI as a result of withdrawals or deregistration. In fact, as a percentage of enrolment, in 2005/6, this figure stood at 17.19%. However, it declined significantly for the two successive years to its lowest of 7.38% in 2007/08. For the two following years, the figures increased to 8.42% and 9.19% respectively. When both universities are compared, the number of students excluded as a percentage of enrolment is 10.65% for UWI and 23.34% for UTECH. This represents a difference of over 100%. In addition, while there was a decline in the number of students who withdrew and or deregistered for the last two reporting years, 2008/9 and 2009/10 at UWI, the reverse is true for UTECH. Based on the data provided, the conclusion could be made that UWI has been able to address the problems related to students' exclusion more effectively than UTECH. This means that UTECH has to employ strategies to do a better job combating the problems related to withdrawal and deregistration.

Overall, the problems related to students' exclusion have implications not only for enrolment numbers but it also introduces inefficiencies in the use of revenues available to both the universities and central government. But maybe of even greater significance is the fact that students are unable to retain a place in the university as a result of financial challenges (Paterson & Gordon, 2010).

The need to continue the expansion of tertiary education, especially at the university level, is central to the development of a country's economy (Caribbean Policy Research Institute, 2009). Camargo (2006) confirmed the view that there is a direct relationship between investments in higher education and increased development in the country. However, this expansion necessitates the availability of massive funding that cannot be borne by either parents or the students themselves, especially in a climate of economic contraction. Government therefore has a responsibility to recognize the challenges students are encountering as they seek to acquire higher education. Further, if government embraces the notion of the public good arising from students acquiring higher education, they should not continue to reduce their support for higher education, but instead seek to establish a policy framework which will take into consideration the needs and concerns of government and students alike.

Analyzing the Revenue Sources

The sources of income for the two institutions, UWI and UTECH, are essentially similar. This is not surprising since both institutions are products of the state. The UWI,

Mona is a part of a regional university system which was established in 1948 as the University College of the West Indies. In 1962, the UWI became an autonomous institution serving the English-speaking countries in the Caribbean region (UWI, 2006). UTECH commenced in 1958 as the Jamaica Institute of Technology, offering diploma/certified programmes. However, the following year it was renamed the College of Arts, Science and Technology (CAST). By 1986 it gained the status of a degree-granting institution, and finally in 1999 it was legally granted university status and given its present name (UTECH, 2009).

As is the case in many other developed and developing countries, the Jamaican government is seeking to reduce its financial responsibility to its public universities (James & Williams, 2005). Both the present and former government administrations represented by the Jamaica Labour Party (JLP) and the People's National Party (PNP), respectively, have clearly signalled the need to reduce government's funding for tertiary education (Hutton, 2008). This desire is not borne solely out of the economic challenges of a country. Gordon (2010), citing (Santiago et al., 2008), said that in some countries such as Australia, Chile, Mexico and the United States, students and family members are responsible for more than 30% of the cost of tertiary education. There is a growing consensus that there is a private benefit for students acquiring tertiary education; therefore, it is reasonable for them to meet a greater proportion of the cost of their education (Knight & Rapley, 2007).

An examination of the incomes of both UTECH and UWI shows that in the case of UWI there is a steady shifting of funding sources from government allocation. In the case of UTECH the source of funding remained relatively stable over the five-year period under investigation. Table 3 shows that government's contribution to the UWI as a percentage of its income was an average of 54% with the highest percentage in 2003/2004 and the lowest in 2005/2006. For the other years the income fluctuates within the range. For the UTECH, government's contribution as a percentage of income was at an average of 43%. The highest percentage of 45.79% was allocated in 2007/2008 and the lowest in 39.89% in 2009/2010 (see Table 4). In order for both universities to maintain their level of spending in the face of declining government allocation, they will have to increase their income from other sources. Of interest is the fact that tuition at UTECH went up from J\$0.591B to J\$1.562B or 264% between 2004/2005, and 2009/2010 while at the UWI tuition went up from J\$0.996B to J\$1.43B or 144% between 2003/2004 and 2008/2009. Although the period covered for the universities are not the same, the percentage increase in tuition payment for UTECH students is substantially greater than for UWI. In relation to tuition as a percentage of income, UTECH has registered a steady increase over the reporting period. In comparison, at the UWI, tuition and fees as a percentage of income has been declining over the period under discussion. Even with some fluctuation, tuition and fees for UWI range between 18.68%, in 2005/2006, and 12.66%, in 2007/2008. For the other income areas at UWI, investments remained flat while income from projects declined

over the last three years. The income areas which are showing steady increases include commercial operations and miscellaneous income.

Table 3. Income figures for the UWI from 2003/04 to 2008/9 (J\$'000,000,000)⁴

Sources of Income	2003/ 2004	%	2004/ 2005	%	2005/ 2006	%	2006/ 2007	%	2007/ 2008	%	2008/ 2009	%
Government Contributions	3.620	59.84	3.030	52.06	3.96	51.25	5.080	54.97	5.130	52.16	5.90	54.59
Tuition and Fees	.996	16.46	1.087	18.68	1.140	14.75	1.170	12.66	1.360	13.83	1.43	13.23
Contributions from University Entities	.029	0.48	.026	.46	.047	.61	.035	.38	.139	1.41	.048	.44
Projects	.432	7.14	.446	7.67	.849	10.99	.912	9.87	.621	6.31	.631	5.84
Investments	.183	3.02	.248	4.26	.233	3.02	.223	2.41	.256	2.60	.248	2.29
Commercial Operations	.536	8.86	.593	10.19	.799	10.34	.938	10.15	1.220	12.40	1.39	12.86
Miscellaneous Income	.254	4.20	.389	6.68	.699	9.05	.883	9.56	1.110	11.29	1.16	10.73
Total	6.050	100	5.819	100	7.727	100	9.241	100	9.836	100	10.807	100.0

Note: Information compiled from the Estimates of Expenditure, Ministry of Finance and the Public Service and the Office of the Bursary, UWI

Table 4. Income figures and sources for UTECH (J\$'000,000,000)

Income Areas	2004/ 2005	%	2005/ 2006	%	2006/ 2007	%	2007/ 2008	%	2008/ 2009	%	2009/ 2010	%
Subventions	.829	42.23	.906	44.11	.883	43.50	1.212	45.79	1.262	41.71	1.606	39.89
Tuition	.591	30.11	.683	33.25	.723	35.62	.937	35.40	1.129	37.31	1.561	38.77
Other fees	.116	5.91	.111	5.40	.148	7.29	.190	7.18	.270	8.92	.311	7.72
Hostel & Student Union	.017	.87	.034	1.66	.013	.64	.025	.94	.028	.93	.033	.82
Restaurants & Cafeteria	.051	2.60	.032	1.56	.051	2.51	.057	2.15	.030	.99	.018	.44
Interest	.235	11.97	.168	8.18	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Specified Projects	.037	1.88	.030	1.46	.117	5.76	.092	3.48	.164	5.42	.158	3.92
Amortisation Capital & Revenue	.022	1.12	.021	1.02	.021	1.03	.021	.79	.028	.93	.026	.65
Grants Received												
Other	.065	3.31	.069	3.36	.074	3.65	.113	4.27	.115	3.80	.313	7.78
Total	1.963	100	2.054	100	2.030	100	2.647	100	3.026	100	4.026	100

Note. Information compiled from the Estimates of Expenditure Ministry of Finance and the Public Service and the Office of Finance, UTECH

⁴The exchange rate at the time of the writing of the paper in September, 2012 was J\$89.36 to US\$1.00. (Note that this was the average for the month)

The contribution of government, along with tuition and fees, amounts to 67.82 and 78.66 of income for UWI and UTECH, respectively. Surely, with the difficulties faced by both government and students alike to afford the cost of funding higher education, universities have to find ways of increasing their income from existing income sources by introducing new strategies to significantly change the income mix. However, this may be in conflict with the view that the core business of the universities includes teaching, research and service; therefore, to add business ventures may take it from its core business. The ability of these two publicly funded universities to absorb the revenue cuts imposed by government is doubtful, if not impossible in the short run, without curtailing their programme output and reducing the staff load. However, based on their strategic plans and announced programme interventions to respond to the economic challenges and government's action, the universities are seeking to make up a portion of the shortfall by non-core activities. This seems to be the only alternative, if they are to maintain current income levels. But based on the income-generating activities that have been pursued by both universities over the past six years, projected income earnings from them will not be sufficient to replace the expected reduction in government's allocation. In order to make up the income shortfall, the universities have no options now but to intensify their income-generating strategies and require that students bear a larger portion of the cost of their education. It should be noted that the experience of the banking and other sectors in the 1990s demonstrated that that the latter is fraught with problems and to venture outside of an organization's core business could be a threat to its health and even continued existence (Daley, Matthews, & Whitfield, 2006).

Government Funding of the Education System

The financial allocation by the government to tertiary education, over the six-year period, ranged between 20.73% and 23.22% (see Table 5). This has remained fairly flat over the period. The same pattern is evident for secondary and primary education. (For early childhood education, there was a reduction in allocation in relation to the other three levels of the education system in 2006, 2008 and 2009.) It should be noted that the decline in the allocation for early childhood education seems to occur even though there is a general agreement by those concerned with the performance of the education system that expenditure at this level should be enhanced significantly. This is premised on the fact that the root of the learning problems, including reading, begins at this level. What is most alarming from the data presented in Table 5 is the per capita income allocation for the different levels in the school system. For 2008/2009, the per capita allocation for tertiary education was 13.63 times that of secondary education and 16.92 times that of early childhood education. If the UWI were inserted in the formula (based on government's allocations for 2008/09) it would demonstrate that its per capita expenditure was 17.04 times that of secondary education and 21.74 times for

early childhood education. However, the ease with which these differences are used to criticize the level of allocation to tertiary education does not take into consideration the role of higher education in the country's development and high cost of delivering education at this level.

Table 5. Financial allocation for the education system by the ministry of education (MOE) (J\$'000,000,000)

MOE Allocation	2003/ 2004	%	2004/ 2005	%	2005/ 2006	%	2006/ 2007	%	2007/ 2008	%	2008/ 2009	%
Early Childhood Education	1.46	5.25	1.85	5.63	1.64	4.20	2.33	5.04	2.46	4.37	2.71	4.34
Per Capita Expenditure	10 002		11 105		11 392		12 060		19 739		19 339	
Primary Education	10.00	35.95	11.98	36.46	14.70	37.62	15.51	33.56	19.94	35.46	22.79	36.48
Per Capita Expenditure	30 193		28 860		34 024		44 230		47 651		62 337	
Secondary Education	9.89	35.56	12.05	36.67	14.04	35.94	18.14	39.25	21.04	37.42	24.02	38.45
Per Capita Expenditure	46 568		40 941		45 005		53 332		64 814		75 587	
Tertiary Education	6.46	23.24	6.98	21.24	8.69	22.24	10.24	22.15	12.79	22.75	12.95	20.73
Per Capita Expenditure	138 627		200 296		200 265		233 032		275 612		327 333	
Total	27.81	100	32.86	100	39.07	100	46.22	100	56.23	100	62.47	100

Information compiled from the Estimates of Expenditure and the Economic and Social Survey of Jamaica publication from 2003/04 to 2008/09

The Observer (2010) reporting on the Education Minister's expressed concern about higher education grant, stated that a "disproportionate amount of Government's resources was being spent on tertiary education when compared to other levels of the sector" (p. 1). Despite this, the actual expenditure allocated to each of the first three levels exceeded that of the tertiary level. In fact, from 2003/2004 to 2008/2009 between 76.76% and 79.27% of the expenditure on education was allocated to the early childhood, primary and secondary education while the expenditure for tertiary education has not exceeded 23.22% (see Table 5). But this is not a new phenomenon. Miller (2005) established the fact that between 1995 and 2002, expenditure for "tertiary education has been cut while the expenditure on primary education has been increased as a proportion of recurrent budget." (p. 100). In the case of capital expenditure the situation continues to be biased towards primary and secondary education. Miller (2005) also established that between 1975 and 2002, international donors pursued a policy of enhancing primary and secondary schools. This meant "the virtual absence of capital investment in tertiary education not only reflected government policy and priorities

but also those of donor agencies on which the government has relied” (p. 100). While there is a general agreement that greater emphasis has to be placed on early childhood education, cutting the allocation to tertiary, and specifically university education, will have its own limitations. In fact, there is no evidence that such cuts will translate into a comparable increase in the budget for early childhood education. Indeed, what the cuts will achieve is an increased burden on the public universities and tertiary education in general. The per capita expenditure on tertiary education is clearly significantly higher than any of the other levels but this is determined by the nature of the activities at the tertiary levels in contrast to what takes place at the other three levels. In order to remain among the ranks of the universities with national and international recognition, the contribution of UWI and UTECH to teaching, research and national development are key indicators. These are the activities which indeed fall within the core business of both universities.

The real solution to financing the education system is not a reallocation of the government’s funding from one level to the other on the premise of prioritization (Hutton, 2008). In fact, higher education should be expanded in order to provide a greater pool of graduates to transform the Jamaican economy (James & Williams, 2005). The available evidence shows that countries that do well economically are those with a healthy education system with up to 50% of the workforce benefitting from higher education (Hutton, 2009). Because of the crisis of financing education in Jamaica, the implementation of the objectives of the Education Transformation Fund (ETF) should be treated as a priority by central government and the MOE. This would make more resources available to the education system and in particular public education, which will be the beneficiary of this fund. Government would therefore be in a better position to maintain or increase its budgetary allocation to tertiary education. Consequently, tertiary education and, in particular, UTECH and UWI would be in a better position to expand the number of persons trained at this levels.

Government Funding of Universities and Other Tertiary Institutions

Table 6 shows that UWI received financial support almost five times that of the nearest rival, UTECH. Also, the allocation of funding to UWI far exceeds that which is provided to the other tertiary institutions. This is an area of concern for the emerging rival, UTECH and other tertiary institutions (Kofi K. Nkrumah-Young, personal communication, August 29, 2010). However, as far as attracting greater funding from the government is concerned, UWI contends that it was the only tertiary institution offering higher education prior to UTECH achieving university status in 1999 (Caribbean Policy Research Institute, 2009). Over the past two decades other public and private institutions, both locally and overseas based have been established in Jamaica (Nettleford, 2005). In addition, UWI has introduced numerous programmes across its six faculties, and their output continues to be a benefit to the market locally, regionally

and internationally (Harris, 2007). This means that the nature of higher education has changed significantly.

Table 6. Government's financial contributions to tertiary educational institutions (J\$'000,000,000)

MoE Contributions To Higher Education	2003-2004	%	2004-2005	%	2005-2006	%	2006-2007	%	2007-2008	%	2008-2009	%
UWI	4.0	66.45	4.4	68.32	5.0	67.70	5.0	61.97	7.6	67.98	6.9	57.02
UTECH	.855	14.21	.86	13.35	.880	11.92	1.26	15.62	1.4	12.52	1.9	15.70
Community Colleges, etc	.615	10.22	.61	9.47	.803	10.87	.974	12.07	1.2	10.73	1.9	15.70
Teachers' Colleges	.549	9.12	.57	8.85	.702	9.51	.834	10.34	.98	8.77	1.4	11.57
Total	6.019	100	6.44	100	7.38	100	8.068	100	11.18	100	12.1	100

Information Compiled from the Estimates of Expenditure report from 2003/04 to 2008/09 and the Office of Planning, Principal's Office UWI

Like any other organization, however, UWI's programme activities have to be evaluated in order to ensure relevance and effectiveness. But, it would be an error on the part of the government to seek to redistribute its allocation to education in the same manner that the J\$1B removed from UWI's budget in 2010 was supposed to be reallocated to early childhood education. This approach would severely undermine tertiary education in general and, in particular, reduce the effectiveness of the UWI. Nevertheless, one must accept the position that tradition cannot be the only basis for the UWI to maintain its hegemony as far as funding by the Government is concerned. With a market-driven approach to how universities are organized, funding must be broadened from a university-specific model to one where academic programmes will attract priority funding based on the skill needs of the country. Nkrumah-Young, Huisman & Powell (2008) suggested that funding of higher education should be placed in the hands of:

A Higher Education Authority . . . (to) manage the allocation of the state's funding for teaching and research to higher education institutions, monitor the financial activities of the institutions on behalf of the state, advise the government on the level of the resources to channel to higher education, . . . interpret the state's priorities in relation to manpower needs . . .(p. 225)

In fact, Prime Minister Bruce Golding proposed that the government-operated entity, the Student Loan Bureau (SLB), should adjust its lending policy in order to encourage training in areas where there is a shortage of required competencies (Ja-

maica Information Service, 2009). This approach of setting priorities and providing support to students based on national priorities cannot be faulted, and if the same approach is applied to the allocations made to the public universities, they would have a responsibility to recast their programme offerings to meet the needs of the country. In the final analysis, the institution that is better able to meet both student and societal needs should benefit proportionately from the level of resources allocated by government. Therefore, any change in how government allocates funding to public universities must be determined by the criteria that will take the interests of all stakeholders into consideration. In fact, there should be some reluctance by government to cut the allocation to UWI in order to increase UTECH's without a thorough understanding of programme impact. Indeed, the present expansion mode of the UTECH could be a criterion in the consideration for this reallocation. But a pertinent question to raise at this point is: To what extent can government's policy be advanced in a situation where both UTECH and UWI, "which are funded by the government, . . . be competing with each other.?" (Williams, 2010, p. 1).

Student Assistance Programmes at UWI and UTECH

Student assistance programmes are central features of both universities. For the UWI, the programme includes loans and grants, meals, bursaries, and books (Office of Student Financing, 2010). The areas of assistance are the same for UTECH, except for the provision of the Earn and Study Programme and bus tickets for travel purposes, which UTECH provides. It is instructive to note that the (Financial Aid Office, 2011) pointed out that "as the effects of the economic recession worsened, leaving many families unemployed or underemployed, the financial challenges faced by students reached an unprecedented high . . ." (p. 3). This experience was mirrored by UWI. However, having recognized the challenges, the UWI Annual Report (2010) lamented the fact that the UWI was "less successful in (its) efforts to assist needy students. Despite aggressive attempts to source financial support for these (students), the increase over the previous year in scholarships, bursaries and other kinds of financial aid amounted to just over \$2M" (p. 32).

Table 7 confirms the fact that assistance programmes provided by UWI does not reflect the severe economic challenges students are currently facing. An average of 645 students have benefitted annually from the programmes between 2003 and 2008, with the numbers ranging between 573 in 2004/2005 and 704 in 2006/2007. In contrast, for UTECH over the period 2005/2006 to 2009/2010 an average of 1034 students benefitted from the assistance programmes (see Table 8). In fact, in 2009/2010, UTECH provided support for 456 or 53% over 2005/2006. The Earn and Study and Scholarship programmes provided support for the largest number of students at UTECH. For the UWI, scholarship and bursary programmes benefitted the largest number of students. The data show that over the period, UTECH has mainly increased its benefit to

students in all areas except in bursaries. No such pattern is displayed in regard to the assistance programme provided by the UWI. In terms of the value of the programme for both institutions, the scholarship programme received the highest level of funding, and it has experienced significant increases over the reporting period. In the case of UWI, the scholarship programme moved from J\$48M in 2003/4 to J\$78.7M in 2007/8 or an increase of 63%. For UTECH the value of the programme moved from J\$21.1M in 2005/6 to J\$63.38M in 2009/10 or an increase of 215%. Again the responsiveness of the UTECH was much more effective than that of the UWI.

Table 7. Types and value of assistance programme provided by UWI to students from 2003/2004 to 2009/2010 (J\$'000,000)

Type of Assistance & Beneficiaries	2003/04	2004/2005	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010	Total
Loans	.299	.044	.276	.198	.136	.210	0.0	1.163
No. Benefitting	20	4	17	12	5	7	0	65
Grants	.401	.288	.617	1.329	.613	.485	1.546	5.279
No. Benefitting	39	29	50	47	48	32	102	347
Books	.570	.661	.705	.612	.466	.598	.495	4.107
No. Benefitting	69	72	70	75	52	46	43	427
Meals	.221	.343	.564	.456	.346	.181	.569	2.68
No. Benefitting	40	46	71	55	24	18	52	306
Scholarships	47.986	44.946	53.243	60.415	78.294	78.677	9	485.34
No. Benefitting	306	272	309	324	349	335	480	2375
Bursary	4.048	4.824	4.527	5.603	5.386	7.574	7.275	39.237
No. Benefitting	143	150	172	191	169	204	181	1210
Total Value of All Assistance Programmes	53.525	51.106	59.932	68.613	85.241	87.725	131.66	539.889
Total No. Benefitting Annual	617	573	689	704	647	642	858	4730
Enrolment	13490	14634	15398	15412	14573	14298	15262	103067
Total Benefitting as a % of Enrolment	4.57	3.92	4.48	4.57	4.44	4.45	5.62	4.58

Compiled from information provided by the Mona Information Technology Services (MITS) and Billings and Receivables, UWI

Table 8. Types and value of assistance programmes provided by UTECH to students from 2005/2006 to 2009/2010 (\$'000,000)

Type of Assistance	2005/ 2006	2006/ 2007	2007/ 2008	2008/ 2009	2009/ 2010	Total
Cash Grant	2.559	2.336	3.900	5.219	6.213	20.227
No. Benefitting	141	128	184	223	326	1002
Lunch Tickets & Bus Passes	0.194	0.152	0.513	1.195	2.047	4.101
No. Benefitting	40	37	48	105	177	407
Earn and Study Programme	8.663	11.152	18.629	24.409	26.348	89.201
No. Benefitting	346	315	441	388	408	1898
Scholarships	20.149	35.093	61.985	43.514	63.385	224.126
No. Benefitting	166	250	370	254	296	1336
Bursaries	6.043	4.046	2.365	2.543	3.612	18.609
No. Benefitting	163	109	72	77	105	526
Total Value of All Assistance Programmes	37.608	52.779	87.392	76.880	101.605	356.264
Total No. Benefitting	856	839	1115	1047	1312	5169
Annual Enrolment	9055	9326	9725	11227	11868	51201
No Benefitting as a % of Enrolment	9.45	9.00	11.47	9.33	11.50	10.19

Note. Compiled from information provided by the Financial Aid Office and the Office of Finance, UTECH

The need for an assistance programme has been echoed by both institutions. This is a direct result of students' inability to fund their education. Even with the availability of the student loan facilities, the need for scholarships, which are usually awarded for tuition support, has been increasing. Tuition, which represents the largest component of the expenditure on higher education, is usually paid proportionately over the duration of the academic programme. Currently, the universities have worked out payment plans which will allow students and their parents/sponsors to make payments in instalments during the school year. This approach allows for some temporary respite regarding the time period for payments to be made, but certainly the payments do eventually have to be made. Despite the efforts of the universities to assist students with tuition payments and other basic needs such as travel, meals, etc., many of the students are unable to cope financially. This almost desperate situation for some students gives further credence to the view that the student loan facility, which emphasizes its loan portfolio, must be restructured so that living expenses of students can be addressed. In addition, the universities will have to take the necessary steps in the interim to minimize tuition fee increases, especially in light of government's proposal to reduce its contribution to the budget of the university. The expansion of the assistance

programmes will be an option, but more creative approaches have to be used in order to increase their scope and reach. The provision of tertiary education, and specifically university education, in a climate of financial exigency will always be a challenge, but it may be an ideal time to strengthen educational output in terms of the number of students trained to meet the human resource demands of a recovering economy.

The Role of the SLB in the Funding of Student Education

Table 9 shows the disbursement of loans by the SLB to tertiary institutions between 2003/2004 and 2009/2010, with the amount received by UWI students ranging from a high of 48.67% in 2004/05 to a low of 26.93% in 2009/2010. On the other hand UTECH students received ranging from a low of 24.57% in 2003/2004 to high of 36.47% in 2009/2010. What is most striking about the data is the decline in the percentages and amount of loans received by UWI students in comparison to UTECH's over the period under consideration. For example, in 2003/04 and 2004/05 UWI received loans which were twice the amount received by the students from UTECH. This changed dramatically in 2006/07 when the amount allocated to UWI students had a difference of 8 percentage points; UWI students received J\$0.333M while UTECH students received J\$0.257M of the amount disbursed to tertiary institutions. The gap continued to narrow in 2007/08 when the amount allocated was reduced to one percentage point. In 2008/09 there was a shift in favour of UTECH by 4 percentage points in the value of student loan allocated. This was further extended to 10 percentage points in 2009/10 as loans disbursed to UTECH and UWI accounted for 36.47% and 26.93% of total loans allocated to tertiary institutions. These loans amounted to J\$.543M and J\$.401M, respectively.

Between 2003/04 and 2005/06, there was an average of 21.28 percentage points' difference in the number of UWI and UTECH students benefitting from the student loan facility. This benefit was in favour of the UWI. This was cut by 8% in 2006/07 and actually reversed in favour of UTECH in 2008/09 and 2009/10. In 2009/10, 2254 or 31.38% of the students who received loans were enrolled at the UWI while 2381 or 33.13% of the students were enrolled at UTECH. The change in the number of students who received loans from SLB is explained in part by the fact that UTECH enrolment has increased at a rate that was greater than UWI during the period being reviewed. This would also explain the increase in the amount of loan disbursed to the students of UTECH. Further, as a percentage of enrolment, fewer students from UWI were receiving or borrowing loans in comparison to students from UTECH and NCU⁵ (see Table 9).

The trend is that UTECH students are increasingly accessing more loans than the students of UWI and in fact the number of students accessing loans from UTECH has

⁵ Northern Caribbean University is one of the privately own higher education institution in Jamaica, and the students also have access to student loan.

surpassed those from UWI. This may in fact suggest that more UTECH students are less able to fund their university education without the SLB facility. On the other hand, it could be that these students are better informed regarding the benefits of accessing the loan to fund their education.

Table 9. Value of loans approved for students enrolled at NCU, UWI, UTECH and other tertiary institutions (J\$'000,000,000)

Institution	2003/ 2004	%	2004/ 2005	%	2005/ 2006	%	2006/ 2007	%	2007/ 2008	%	2008/ 2009	%	2009/ 2010	%	TOTAL	%
NCU No. Approved for Loans	.091	19.44	.095	16.87	.126	17.03	.158	18.48	.183	18.45	.246	19.00	.304	20.42	1.203	18.23
UTECH No. Approved for Loans	.115	24.57	.146	25.93	.206	27.84	.257	30.06	.328	33.07	.449	34.67	.543	36.47	2.044	31.15
UWI No. Approved for Loans	.227	48.50	.274	48.67	.333	45.00	.333	38.95	.339	34.17	.398	30.73	.401	26.93	2.305	37.72
OTHER No. Approved for Loans	.035	7.48	.048	8.53	.075	10.14	.107	12.52	.142	14.32	.202	15.60	.241	16.19	0.85	12.90
Total No. Approved for Loans	0.468	100	.563	100	.740	100	.855	100	.992	100	1.295	100	1.489	100	6.402	100
	4994	100	5477	100	6134	100	5948	100	6469	100	7447	100	7183	100	43652	100

Compiled from Information provided by Student Loan Bureau (SLB) for the period 2003/04 and 2009/10

Delinquency by Loan Beneficiaries

The SLB would have at its disposal J\$1.72B to replenish its funds to make loans to students for the 2010/11 academic year (Jamaica Information Service, 2010). However, a further report from the SLB indicated that only US\$5M would be available on an annual basis until the loan is fully disbursed. This amount, converted at the prevailing exchange, rate would be J\$0.430M, which is 28.8% of the loans disbursed to UWI, UTECH and other tertiary institutions in 2009/2010. From these institutions, as of November 2010 there were 5898 beneficiaries in arrears, amounting to over J\$947M (see Table 10). This represents 64% of the loan made available to students in 2010. As Table 10 shows that the UWI students owe J\$610.91M or 64% of the amount, while UTECH students owe J\$337.39M or 36%. The level of delinquency will restrict the ability of the SLB to respond to the needs of students, especially if refinancing has been curtailed due to the unrelenting economic crisis facing the government. The announced US\$20M to the SLB will provide a buffer at least in the short-run, until more long-term funding is available.

Table 10. SLB reported loan delinquency for UWI and UTECH for the period ending November 2010

Institution	Number Owing	%	Amount owing	%
UWI, Mona	3430	58	609,909,500.51	64
UTECH	2468	42	337,385,117.83	36
Total	5898	100	947,294,618.34	100

Note. Compiled from information provided by the Student Loan Bureau (SLB) in December 2010.

Strategies to Change the Funding Relationships at UWI and UTECH The UWI Initiatives for Institutional Strengthening

The UWI is currently instituting a radical reworking of its internal systems and structure in order to reduce cost. This has become one of the major short-term strategies. Others include recruiting from among the best of the available students to pursue its programmes; responding to student expectation; reforming its curriculum in order to support the strategic economic activities of the country/region; preparing graduates who will be responsive and relevant to the needs of the employers; expanding its services to meet the needs of Jamaica and the region; and diversifying the income-generating activities of the University (UWI Annual Report, 2010). At the base of the initiatives is to improve the performance of the institution while at the same time dealing with the massive revenue reduction imposed by government. Williams (2010) described the approach taken to address this issue by the University thus:

Having carried out a diagnostic analysis of the organization, they discovered that the current stock of resources could deliver higher value if used more efficiency. This has led to a set of measures that are aimed at better aligning the University's resources to its overall strategic goals and imperatives. (p. 4).

The specific cost-saving interventions include (a) reorganizing academic and administrative processes, (b) reviewing employee benefits, (c) reviewing post retirement contracts, (d) reviewing non-staff operating expenses, (e) freezing vacancies, (f) sharing of costs across campuses, and (g) review of all programme pricing (Shirley, 2010)

Targeting the best and brightest students and broadening the student base are two of the goals related to student quality being pursued by the University. This is evident by the number of persons who have been accepted to pursue degree programmes. In addition, one aspect of the long-term plan is to substantially increase the number of international students studying at the UWI, Mona. The area of sports development is now being promoted with the provision of scholarships for both football and track and field.

Students now have a choice of institutions they can pursue their academic goals. It behoves the UWI to become more responsive to the needs of its students. The targeted areas include (a) student orientation, (b) improving the performance of the administrative systems, (c) enhancing existing curriculum with information and communication technologies (ICT) playing a major role in programme delivery, (d) improving the physical plant, including the library facilities and services (UWI, 2010).

A number of graduate and undergraduate programmes have been implemented to support the country's drive to develop the economy across a number of sectors. As pointed out "some 50 new courses were introduced to respond to shifting or unfulfilled needs" (UWI, 2010, p. 35) of the economy. Strengthening of the research capabilities of the University is a primary goal and all faculties are involved in this agenda.

The need for the institution to respond to the government's action to reduce its contribution to the UWI has led to a number of different initiatives. These include the introduction of new academic programmes in engineering, agriculture, digital media, law, and dentistry; increase student housing to benefit from rental fees; recruitment of international students who will be full-fee paying students; increasing the number of programmes which are full-fee paying; emphasizing consultancy as a serious income stream; and intensifying income-generation through enhanced business activities. (UWI, 2010).

In addition to its income-generating activities, the UWI has sought to broaden its income options through the operation of the UWI Development and Endowment Fund (UWIDEF) with the alumni also making a difference. The UWIDEF has as its mandate to raise funds "for the development of the University of the West Indies in Jamaica, to promote and develop, for the benefit of the public, greater social cohesion through increased access to higher education and to assist in advancing the economic and social development of Jamaica" (Fund, 2003, p. 1). The UWIDEF manual outlines a comprehensive set of activities that provide significant monetary--and other types of support if pursued vigorously over time (UWIDEF, 2003). The foundations and endowment funds that have been established in some of the leading international universities, took quality time and effort to realize their goals. Therefore, the UWI has satisfactorily laid the foundation to succeed in this area (UWIDEF, 2011).

The UTECH Initiatives for Institutional Strengthening

The 2008-2015 strategic plan outlines the activities the UTECH will pursue in order to remain relevant and compete with other tertiary institutions. In outlining the strategic direction, the plan indicated that:

The overriding outcome of these activities is that the University needs to reposition itself fully in order that its own unique characteristics and capabilities, reputation and resources, will be a vital component of the platform on which the University will compete during the next septennial period. (Office of the President, 2007, p. 5)

The University has outlined three elements which it will pursue over the life of the plan. These include (a) upgrading and adding to its plant and overall infrastructure in order to respond to their expanded activities, (b) upgrading the qualification base of its academic staff and strengthening its organizational structure, (c) offering new programmes and services to enhance its income generation activities and the quality of services to students (Office of the President, 2007).

As the University expands its student intake and diversifies its programme offerings it is necessary to make the plant ready. The targeted projects include (a) expansion of classrooms and laboratory facilities, (b) increasing its water storage capacity to deal with the frequent disruptions in supply, (c) construction of sewage treatment plants to cope with the expansion of the student population. The expansion of the University beyond the present site necessitates the acquisition of lands in St. Mary and St. James. Student housing has also been identified as one of the building projects to manage the dearth of boarding facilities at the UTECH. Information communication technologies (ICT) will be expanded to facilitate distance education, and the library will also be upgraded in keeping with the overall thrust of the University to become relevant and effective (Office of the President, 2007).

The second element of the strategic plan will focus on strengthening the capacity and capability of the staff. In addition to improving their competencies to take advantage of their creative capacity to solve problems, the University will also implement a performance management system which will link remuneration to organizational performance. At present, the number of lecturers without a terminal degree is at an unacceptable level. The University proposes to have a minimum of 30% of the faculty with PhDs by the end of the planning period. Those seeking to upgrade their qualification will benefit from a revolving loan facility (Office of the President, 2007).

The mix of activities for element 3 includes an expansion of its academic programmes. This expansion will target areas such as law, sports, nursing, dentistry and allied health sciences. There will also be an expansion of graduate programmes at the Masters and PhD levels. Research will be further promoted and the Office of Graduate Studies and Research will be upgraded to a school. Income-generating activities will focus on consultancy services which will be accomplished by (a) upgrading its Technology Innovation Centre (TIC), (b) enhancing its Continuing Education Open and Distance Learning (CEODEL) among others. For this element, the University has pledged to increase its effort to address the needs of students by improving the processes which they have to encounter and by increasing access to sources of funding (Office of the President, 2007).

Conclusion

Both the UWI and UTECH are pursuing programmes of renewal and restructuring. The UWI is aggressively seeking to improve its efficiencies by rationalizing its

activities (academic and otherwise) and cutting waste. This has become a challenging exercise, which may eventually lead to staff reductions, the removal of courses; and even the cutting of programmes which failed to meet performance targets set by the institution. However, by taking advantage of the opportunities available to it, the UWI is implementing new programme offerings, especially in the area of law and medicine. UTECH is pursuing similar academic options to UWI because its programme expansion is also targeting areas such as law, medical sciences, among others (PIOJ, 2009). In addition, at the rate student enrolment is expanding at UTECH, it will surpass the student population at the UWI in a few years from now. There is clearly a level of competition between both universities. The question that will confront both universities in the near future, if not already, is: Who will be better able to respond to the needs of its students and the country as a whole, especially if the government decides to reward the university that is better able to demonstrate creativity and responsiveness?

Özet

Giriş

Üniversiteler, dünya ekonomik krizinin ışığında önemli zorluklarla karşı karşıya kalmaktadır. 2010-2011 akademik yılında, Batı Hint Adaları Üniversitesinin, 2009-2010 akademik yılına oranla % 28.5 daha az bir harcama bütçesi ile devam etmesi istenmiştir (Alleyne, 2010, p. 1). Devlet, yükseköğretime eğitimin diğer kademelerine kıyasla daha fazla para ayırmaktadır (Observer, 2010); bunun nedenle hükümet, yükseköğretim maliyetinin % 30'unun üniversiteler tarafından karşılanmasını şart koşturmuştur. Aslına bakılırsa, devlet BHAÜ'nün bütçesini % 28.5 oranında azaltmıştır buna karşılık BHAÜ'nün finansal politikası da "mümkün olduğu sürece verimliliği artırmak için yapılan faaliyetleri dönüştürme sürecini hızlandırmak ve daha fazla öz-sürdürülebilirlik sağlamaya yönelik hareket etmek" şeklinde olmuştur.

Kavramsal Çerçeve

Üçüncü düzey eğitimin (yükseköğretim) finansmanı genellikle hükümet, bağışlar, yükseköğretim kuruluşları ve aile/öğrenciler gibi öğeleri de içeren beş temel kaynaktan sağlanmaktadır (Gordon, 2010). 2009-2010'da hükümet okul harcının % 80'ine kadar destek sağlamıştır (Ministry of Finance and the Public Service, 2009). Geri kalan % 20'si ise öğrencilerin sorumluluğuna bırakılmıştır. Bu örnek 1970'lerden gelen bir siyasal çerçeveden kaynaklanmıştır (Nkrumah-Young ve diğerleri, 2008).

Üniversitelerin yükseköğretimin finansmanında daha büyük bir rol almasının beklenmesi (Davies, 2005) geleneksel bakış açısından öte, gelir getirici faaliyetler ile iç içe olmalarına neden olmuştur (McGregor, 2008). Bununla birlikte, yükseköğretimin finansmanında devletin devam eden rolünün temeli iyi yapılandırılmıştır (Woodhall, 2007). Hutton (2013), Gordon'ın (2010) bir gelire bağlı geri ödeme ilkesini temel alan öğrenci kredi modelini benimsemiştir (Barr, 2005).

Caribbean Policy Research Institute (2009) yetkin bir işgücünün eğitiminde okullaşmanın önemine işaret etmiştir. Camargo (2006), UNESCO'nun görüşüne paralel olarak (2003), üniversite eğitiminin nüfusun % 50'ye kadarki kısmında gerçekleştirildiği ülkenin gelişmişlik düzeyinin artması ile yükseköğretime yapılan yatırımlar arasındaki kesin ilişkiye dikkat çekmiştir.

BHAÜ ve TÜ'de Öğrenci Kayıt Modelleri

TÜ'de öğrenci kayıtları, 2004 ve 2009 yılları arasında % 16.02'lik bir artış göstererek 9.677'den 11.227'ye yükselmiştir. Bu sayı, hedeflenen 5.000 kişilik ek kontenjan sağlansaydı, daha da artabilirdi (Reid, 2009). 2007'de BHAÜ, 2012'ye gelindiğinde 22.000'e yakın öğrenci kaydına ulaşılacağını planlamıştır (UWI Strategic Committee, 2007) fakat 2003-2004 yılında 13.490 olan öğrenci kayıtları, 2009-2010 yılında 15.262'ya ulaşarak %13.14'lük bir artış göstermiştir. Genel olarak veriler TÜ adına bir artış olduğunu göstermektedir. Adayların sadece 6.208'i ya da % 18'inin herhangi bir yükseköğretim kurumuna kaydolabilecek nitelikte olduğunu belirtmek gerekmektedir (PIOJ, 2009). Bu durum, okuldan atılmalar ve öğrencilerin maddi yetersizlikleri nedeniyle ücretleri karşılayamaması sonucu kayıtların silinmesi ile birlikte daha da kötü bir hal almıştır (Paterson & Gordon, 2010).

Gelir Kaynaklarının Analizi

Hem BHAÜ hem TÜ için gelir kaynakları aslında birbirine benzemektedir. BHAÜ'nün 1948'den (UWI, 2006), TÜ'nün ise 1958'den bu yana devletin bünyesinde hizmet veren kurumlar olduğunu göz önünde bulundurursak bu durum şaşırtıcı değildir. Jamaika hükümeti devlet üniversitelerine olan finansal sorumluluğunu azaltma arayışı içindedir (James & Williams, 2005) ve bu durum sürekli olarak ve açık bir şekilde ifade edilmektedir (Hutton, 2008). Gordon (2010), Santiago ve diğerlerine (2008) atıfta bulunarak, Avustralya, Şili ve Meksika gibi ülkelerde öğrenciler ve ailelerinin yükseköğretim masraflarının % 30'unun fazlasından sorumlu olduklarını belirtmektedir (Knight & Rapley, 2007).

BHAÜ ve TÜ'nün gelirleri incelendiğinde BHAÜ'de devletin tahsis ettiği finans kaynaklarında sürekli bir değişimin olduğu görülmektedir. Her iki üniversite de harcama seviyesini korumak için diğer kaynaklardan gelen gelirlerini arttırmak zorunda kalacak gibi görünmektedir. İki üniversitenin gelirlerinin analizi, TÜ'nün rapor edilen dönemde öğrenim ücretlerinin gelir oranında sürekli bir artış kaydettiğini göstermiştir. Öte yandan BHAÜ'de gelir yüzdesi olarak öğrenim ücretleri ve harçlarda söz edilen dönem süresince bir düşüş görülmüştür. Genel olarak, hükümetin öğrenim ücreti ve harçlara olan katkısı BHAÜ için 68.72, TÜ için 78.66 olmuştur. Şunu da belirtmek gerekir ki 1990'lardaki bankacılık ve diğer sektörlerin deneyimi, zaruri olmayan işlere (non-core business) girişiminin problemlili olabileceğini göstermiştir (Daley ve diğerleri, 2006).

Eđitim Sisteminin Dayandıđı Devlet Fonu

Altı yıllık dönemde, hükümetin yükseköğretime ayırdıđı finansal ödenek % 20.73 ile % 23.22 arasında seyretmiştir. Bu dönem boyunca bu durum oldukça düz bir şekilde devam etmiştir. Aynı örnek ilk ve orta örnek için de belirgin olarak görölmektedir. Observer (2010) eğitim bakanının yükseköğretim burslarına ilişkin ifade ettiđi kaygılarını rapor ederek, “hükümetin kaynaklarının büyük bir kısmının diđer kademelerle kıyaslandığında yükseköğretime harcandığını” belirtmiştir (s. 1). Buna rağmen, eğitimin ilk üç kademesine ayrılan miktar yükseköğretime ayrılan miktardan fazla olmuştur. Miller (2005), 1995 ve 2002 yılları arasında, “ilköğretime yapılan harcamalar tekrarlayan bütçe oranı doğrultusunda artarken, yükseköğretim için yapılan harcamaların kesintiye uğradığını” gerçeđini vurgulamıştır (s. 100). Eğitim sistemini finanse etmenin gerçek çözümü, hangi kademeye öncelik verileceđini belirleyerek bütçenin kademeler arasında aktarılması deđildir (Hutton, 2008). Aslında, Jamaika ekonomisini deđişime uğratabilecek daha kaliteli üniversite mezunları sağlamak adına yükseköğretime ayrılan bütçe artırılmalıdır (James & Williams, 2005 ; Hutton, 2009).

Üniversite ve Diđer Yükseköğretim Kurumlarında Devlet Fonu

BHAÜ en yakın rakibi TÜ’ne göre beş kat daha fazla finansal destek almaktadır. Bu, gelişmekte olan rakip TÜ için oldukça endişe verici bir durumdur (Kofi K. Nkrumah-Young, kişisel görüşme, 29 Ağustos, 2010). Fakat BHAÜ, TÜ’nün 1999’da üniversite statüsünde kabul edilmesinden önce, üniversite düzeyinde eğitim veren tek yükseköğretim kurumu olduğunu ileri sürmektedir (Caribbean Policy Research Institute, 2009). Aslında geçtiğimiz yirmi yılda Jamaika’da, hem yerel hem de yurtdışı merkezli özel üniversiteler ve devlet üniversiteleri kurulmuştur (Nettleford, 2005). Buna ek olarak, BHAÜ altı fakültesinde birçok çeşitli program seçeneđi sunmuştur ve bunların çıktıları piyasalara yerel, bölgesel ve uluslararası anlamda yarar sağlamaya devam etmektedir (Harris, 2007). Nkrumah-Young, Huisman & Powell (2008) yükseköğretimin finansmanını, devlet fonunun tahsisinden sorumlu bir yükseköğretim otoritesinin eline bırakmanın gerekliliđi üzerinde durmuşlardır. Aslında, başbakan Bruce Golding devlet tarafından idare edilen bir kuruluş olan Öğrenci Kredi Bürosunun (ÖKB) ihtiyaç duyulan yetkinliklerin az olduđu bölgelerde eğitimi desteklemek adına kredi verme politikasını düzenlemesi gerektiđini belirtmiştir (Jamaica Information Service, 2009). Doğrusunu söylemek gerekirse, TÜ’nün kullandığı genişleme modeli yeniden tahsis edilme durumunda bir kriter olarak ele alınabilir. Fakat bu durumda bir soru akıllara gelmektedir: “Birbirleri ile yarışan ve devlet tarafından finanse edilen TÜ ve BHAÜ’nün bulunduđu bir durumda devlet politikası ne ölçüde geliştirilebilir?” (Williams, 2010, s. 1).

BHAÜ ve TÜ’de Öğrenci Destek Programları

Öğrenci destek programları her iki üniversite için de merkezi bir özellik olarak görölmektedir. BHAÜ’de destek programı içinde kredi ve hibe, yemek, burs ve kitaplar yer

almaktadır (Office of Student Financing, 2010). TÜ’de ise yukarıda verilenlere ek olarak, Kazan ve Öğren Programının (Earn and Study Programme) sağlanması ve seyahatler için otobüs biletlerinin karşılanması gibi destekler bulunmaktadır (Financial Aid Office, 2011). Bir yardım programının ihtiyacı her iki üniversite tarafından dile getirilmiştir. Bu durum, öğrencilerin eğitimlerini finanse edebilmelerindeki yetersizliğin bir sonucudur. Öğrenci kredi olanaklarına rağmen genellikle harçlara destek olarak verilen burslara olan ihtiyaç artmaktadır.

ÖKB’nin Öğrencilerin Eğitimlerinin Finansmanındaki Rolü

2010-2011 akademik yılında ÖKB’nin kredi programını yenilemek için kullanılabilir 1.72 milyar Jamaika dolarının olduğu konusunda belirsizlik mevcuttur (Jamaica Information Service, 2010). 2003-2004 ve 2009-2010 yılları arasında, ÖKB tarafından üniversitelere verilen kredi harcamaları incelendiğinde, BHAÜ öğrencilerinin 2004-2005 yılında % 48.67 ile en yüksek, 2009-2010 yılında % 26.93 ile en düşük kredi alma oranına sahip oldukları görülmektedir. Öte yandan TÜ öğrencileri 2003-2004 yılında % 24.57 ile en düşük kredi alma oranına sahipken, 2009-2010 yılında bu oran % 36.47 ile en yüksek seviyeye ulaşmıştır. Bu verilerde, adı geçen dönemlerde TÜ öğrencilerinin kredi alma yüzdelerinde artış gözlenirken, BHAÜ öğrencilerinin kredi alma yüzdeleri ve miktarlarındaki düşüş göze çarpmaktadır. Örneğin, 2003-2004 ve 2004-2005 yıllarında BHAÜ öğrencileri, TÜ öğrencilerine oranla iki kat daha fazla kredi almıştır.

2010 Kasım ayında, borcu 947 milyon Jamaika dolarını aşan 5898 lehtar bulunmaktadır. Bu durum, 2010 yılında toplam kredi bütçesinin % 64’ünün öğrencilere ulaştırıldığını göstermektedir. BHAÜ öğrencilerinin 610,91 milyon Jamaika doları ya da kredi miktarının % 64’ü kadar geri ödemesi bulunurken, TÜ öğrencilerinin kredi miktarının % 36’sı ya da 337,39 milyon Jamaika doları geri ödemesi bulunmaktadır. Borçların bu seviyede geri ödenmemesi, özellikle devletin yüzleştiği acımasız ekonomik krizden dolayı finansmanın yeniden kesintilere uğradığı bu dönemde, ÖKB’nin öğrencilerin ihtiyaçlarına karşılık verebilme yetisini kısıtlayacaktır (The Student Loan Bureau, 2010).

BHAÜ ve TÜ Arasındaki Finansman İlişkilerini Değiştirmeye Yönelik Stratejiler

BHAÜ bu günlerde, masrafları azaltmak için iç sistemlerinde ve yapılarında radikal bir yeniden düzenleme uygulamaktadır (Williams, 2010; Shirley, 2010 ; UWI 2010). Bu strateji, temel kısa dönem stratejilerinden birisi olmuştur. Diğer stratejiler arasında programları yürütebilmek için mümkün olduğunca en iyi öğrencileri işe almak, öğrenci beklentilerini karşılamak, ülke-bölgenin ekonomik faaliyetlerini desteklemek adına eğitim programlarını yeniden düzenlemek, işverenlerin ihtiyaçlarına karşılık verecek mezunlar vermek, Jamaika ve çevresinin ihtiyaçlarını karşılayacak hizmetler geliştirmek, üniversitenin gelir sağlayıcı etkinliklerini çeşitlendirmek (UWIDEF, 2010) ve gelişme ve bağış fonunu güçlendirmek yer almaktadır (UWIDEF, 2003; UWIDEF, 2011).

Sonuç

2008-2015 stratejik planı, TÜ'nün diğer üniversitelerle boy ölçüşmek için izleyeceği faaliyetleri ana hatlarıyla belirtmektedir. Plana göre üniversite üç unsur üzerinde durmaktadır. Bunlar arasında (a) geliştirmiş oldukları etkinlikleri karşılayabilmek için altyapı ve tesisleri arttırma ve geliştirme, (b) örgütsel yapısını güçlendirme ve akademik personelin niteliklerini geliştirme, (c) öğrencilere verilen hizmeti geliştirme ve gelir getirici faaliyetleri arttırmak için yeni hizmet ve programlar sunma yer almaktadır (Office of the President, 2007). İlgi çekici olan şey şudur ki; her iki üniversite de benzer akademik programı izlemektedir. Asıl soru, bu durumun kimin yararına olduğudur.

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