

THE EVALUATION OF THE IMPACT OF THE SYSTEM OF NORMS
AND STANDARDS OF FUNDING, ON OPERATIONAL ACTIVITIES
OF SELECTED SCHOOLS IN THE RURAL AREAS.

BY

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Declaration

I, Zola Myataza, a student of Fort Hare University, School of Public Management and Development at Bisho campus, declare that to the best of my knowledge the work presented in this dissertation, which is submitted in partial fulfilment of the requirements for the Masters degree in Public Administration, is my original work and has not been submitted for examination or a degree at this or any other University.

Signed:  08-09-2009



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ABSTRACT

The research focuses on the funding of the South African public schools that are based in the rural areas, including those that are referred to as farm schools. Particular attention is given to the process and systems of funding during the apartheid era and in the new dispensation after 1994. The research topic is based on the premise that rural and farm schools respectively were systematically and intentionally deprived of the basic resources under apartheid. The same still continues currently because they still lag behind in the allocation of resources, through funding and infrastructural provision, under the post-apartheid era.



The unequal allocation of funds for black schools under apartheid era caused so much damage and delay in the development of rural schools and placed the burden of financial support on the poor black communities. The backlog that has resulted from unequal distribution of resources impacted negatively on the rural schools and still continues to cause havoc even in the present. The inability of black communities then to support their schools in a meaningful level needs to be understood in the context of the political, economical, social and educational policies and the forces that be that were operating and effective then.

The new dispensation, following the first ever-democratic elections in 1994, witnessed the insurmountable task that lay ahead of repairing the ravages of apartheid in the black educational system. The intensity of the damage could not be undone over a short span of time and it also necessitated the availability of funds that would equal the challenges of repairing. This is displayed by the state and conditions in which the majority of rural schools operate. The majority of

schools in the rural and farm areas still show the scars caused by apartheid policies. The new system of funding has not yet transformed these schools to be on the par with white schools that benefited during apartheid and still continue to. However the new system of funding has done much to serve as a launching pad in an attempt to bring about change in the daily pedagogical activities in these schools. The majority of Principals in the study echoed that the government is not doing enough to redress the imbalances of the past. They believe that the first move by government should have been to create equilibrium, by providing funds to rural schools to elevate them to the same level as white schools. They also argue that the allocations of funds look substantial, but practically they are just not enough. They advise that a hefty injection of funds is needed to practically undo the ravages of apartheid, and to realise the objective of completely redressing the past imbalances and traces injustice, and to establish equity in education in all levels.

The task of supporting rural and farm schools should not be placed squarely on the shoulders of the government, rural communities should also play an active role in the bid for a turnaround. Rural communities need to be helped to be conscious of their comparative advantages that they can utilise to source in the financial support they need. The reality of poverty and desolation of rural communities seriously limits the developmental possibilities that might be achieved through education. There is so much work that needs to be done to put the rural and farm schools on a better position.

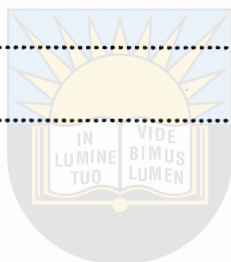
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CHAPTER 1

INTRODUCTION AND GENERAL ORIENTATION

1. INTRODUCTION

The aim of the research is to evaluate, in a selected number of schools, the extent to which the schools in the rural areas around King William's Town and Stutterheim are enabled by the system of Norms and Standards of Funding to effectively and efficiently finance their operational activities and cost. It is intended to examine and ascertain whether the Department of Education nationally and the Department of Education in the Eastern Cape in particular is able to carry out its responsibilities, as spelt out in the South African Schools Act, 1996 section 34 (1). This section spells it out that " the State must fund public schools on an equitable basis in order to ensure the proper exercise of the rights of learners to education and the redress of the past inequalities in educational provision", (extracted from Government Gazette,2006:7).

The dispensation before 1994 in the South African non-white schools, particularly Black schools was characterised by pain and a gloomy future. The public schools experienced financial strife and hardships and they still do, due to the financing policies of the apartheid government. The schools in the rural areas suffered the most, as they depended most on meagre school fund that was collected from financially disadvantaged communities. The financial status of those communities was so challenged such that rural schools remained poorly resourced in learning resources and equipment, not to mention the buildings and the playgrounds. The situation in rural schools before 1994 was very demoralising to both Teachers and Learners. It was

under these conditions that learners were expected to learn and Teachers to teach effectively. It was under these conditions that teachers taught and motivated their learners with excellent performance. It was under the trees, dilapidating classrooms and broken windows that African learners displayed their resilience to do their best no matter what the conditions dictate.

The government's spending on the African schools, especially, in the rural areas was between five and ten times less in comparison to White schools. This meant that Black schools were extremely under funded compared to those belonging Whites, Coloureds and Indians respectively. The same scenario still continued even under the new dispensation after 1994. Harber (2001:16-17) cited that Azuma made a sample of 26 primary schools and 3 secondary schools in the Durban area which highlighted continuing inequalities in funding these schools. Azuma found that in 1998 the average annual fees in ex-KwaZulu Department and Culture schools was R86, in ex-Department of Education and Training schools it was R90, in ex-House of Delegates it was R208, in ex-House of Representatives it was R225, and in ex-House of Assembly it was R2791. In three secondary schools the fees at the ex-KDEC were R100, at the ex-HOD schools were R220, and at the ex-HOA schools they were R4500. Many schools in the rural areas still suffer the legacy of large classes, deplorable physical conditions and absence of learning resources. It is under such poor conditions that effective teaching and learning is expected to take place. These rural schools are expected to achieve the same level of learning and teaching as their counterparts in well-resourced schools in the urban areas.

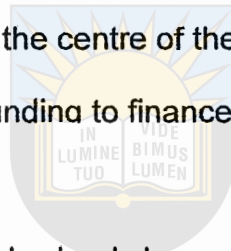
2. STATEMENT OF THE PROBLEM

The problem is the inadequacy of the system of Norms and Standards of Funding in addressing and removing the past inequalities and injustices which existed in black education, particularly the rural schools. Rural schools still lack educational resources that have a bearing on their operational activities. For example, many rural schools do not have computers, television sets and video machines, telephones and fax-machines and do not have access to Internet and other educational programmes because they lack the necessary financial resources, to mention just a few areas of need. According to the provision that is contained in the Preamble to the South African Schools Act, 1996 it is stated that “ a new national system for schools is required to redress the past injustices in educational provision, to provide an education of progressively high quality for all learners...”(Gazette No. 29179 of 2006:9). This provision seeks to lay a foundation for a strong foundation for the development of the learners’ talents and capabilities. It also acknowledges that such objectives may not all be accomplished due to budgetary constraints, but priority to redress and improve equity, must be given to the needs of the poorest. These must be applied or implemented to both the General Education and Further Education and Training Phases.

The research is looking at the following problems:

- That the above expectations have not been fully achieved, especially in schools belonging to rural communities.

- Rural schools were the most neglected during apartheid government. still they do not receive full attention in this dispensation. There is still mud- schools. school buildings are dilapidating due to lack of maintenance. most of them need renovation and there is lack of learning resources.
- That the system of funding schools is not effective enough to redress the past inequalities in educational provision as stated by its objectives. This is where the centre of the research is. Rural schools are not getting enough funding to finance their operational activities.
- The conditions in the rural schools have not improved.
- Evidence shows that rural schools still experience large classes: deplorable buildings: and absence of proper learning resources. As a result rural schools are losing learners to urban or township schools. Learners that represent the “crème de la crème” are relocating to better resourced schools. which are deemed better schools.



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3. DELIMITATIONS OF THE STUDY

The challenges that the researcher might face are:

- The sampling of schools both in King William's Town and Stutterheim. For the purpose of the research the researcher is expected to take only 10% of the schools in each area. The researcher will select 15

schools from 150 schools in the geographical target group. This means that the distance will be a challenge.

- Another challenge will be the volume of the data that will be collected when it comes to sifting information according to its levels of importance and relevance to the topic.

The collection of data through the method of research questionnaires and interviews can challenge the researcher, in that, the respondents or participants may not have enough time to participate extensively to the benefit of the researcher due to work commitment, or due to changes in the work environment, like relocating.

Participants might not be as co-operative as the researcher wants them to be, leading to scanty contributions.

The selection of respondents that the researcher thought know more only to turn out their knowledge about the subject is very helpless and distorted.

Some participants could have problems with time and distance due to the areas that they work in, especially the transport problems in rural schools.

Financial problems will also surface at some stages during the research.

Some documents and articles needed for the research might not be available for public scrutiny due to protocol or security.

4. RESEARCH OBJECTIVES

The research aims at:

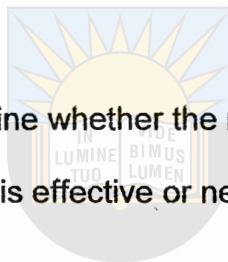
- Evaluating the effectiveness of the Department of Education's system of Norms and Standards of Funding in funding the rural schools in order to redress the injustices of the past.
- Assessing whether the failure to achieve the above objective does not have an impact on the teacher and learner ability to achieve the levels of performance and achievement that are on par with their counterparts in well-funded and better resourced schools.
- To look at what informs the department of Education to allocate a particular amount of allotment to a particular rural school.

5. HYPOTHESIS OF THE STUDY

The system of Norms and Standards of funding has failed to help schools in their operations and infrastructure. Therefore, it has not done much to redress the inequalities and injustices of the past disparities in funding, especially for schools in the rural areas.

6. THE SIGNIFICANCE OF THE STUDY

- This study will add to the already existing mine of data on the topic and will also shed light on how much ground has been covered so far.
- It will assist officials to be able to make informed plans and decisions that will improve the system of funding.
- This study will also determine whether the present system of Norms and Standards of Funding is effective or needs to be changed.
- This means that it will help in identifying strengths and weaknesses of the system.
- This study will also add value on the system of Funding. It will show the significance of having an effective system in the process of funding rural schools.



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RESEARCH OVERVIEW

The research will follow a chronological order of the following nature:

CHAPTER ONE

This is the introduction to the research. It tells what this study is all about and its end result. The basic tenet of the study is to evaluate the effectiveness of the system of Norms and Standards for Funding in the daily operational activities of the rural schools.



CHAPTER TWO

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The Literature Review looks at the process funding black public schools from the early years of the 20th century. This serves as a background and looks at how this process has evolved over the years during the years of apartheid.

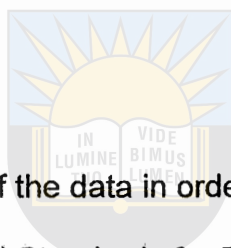
This background also serves to show the gravity and the depth of the damage caused by unequal and racially motivated funding in black schools. It is this gravity and depth of the damage that the new system of funding, after 1994, sought to remedy.

CHAPTER THREE

Focus is on the system of Norms and Standards for Funding public schools. This chapter looks at what this system is all about: its main objectives and its application. The applying principle behind this system is to allocate and provide funds to all public schools on an equitable basis, in order to redress the past injustices in funding.

CHAPTER FOUR

The focus here is the collection of the data in order to prove or disprove the fact that the system of Norms and Standards for Funding has failed to redress the past injustices in funding.



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CHAPTER FIVE

Here the data collected in the previous chapter will be sifted and analysed. The findings will determine the validity of the hypothesis or prove it invalid.

CHAPTER SIX

This is the conclusion of the study and new ideas will be tabled which will be of value to the topic for further investigations.

CHAPTER TWO

LITERATURE REVIEW

INTRODUCTION

This chapter looks at the funding of schools belonging to non-white schools, particularly black schools. The central point of focus is the unequal financial provisions between Black; White; Coloured and Indian public schools. There is a comparative look at patterns of funding public schools between South Africa during apartheid era and Zimbabwe during the colonial rule. Focus is also given to the effects of the pattern of unequal funding to black schools that are established in the rural areas and on the farms.

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LITERATURE REVIEW

The Preamble to the South African Schools Act contains a provision which states that "a new national system for schools is required to redress the past injustices in educational provision, to provide an education of progressively high quality" (Gazette No.29179 of 2006:9). The provision goes on to state the basic principles of state funding of public schools stem from the constitutional guarantee of equality and recognition of the right of redress. The Act provides that:

"The State must fund public schools from public revenue on an equitable basis in order to ensure the proper exercise of the rights of learners to education and the redress of past inequalities in educational provision" (South African Schools Act, 1996, Section 34(1)).

These principles serve to guide the Minister of Education in determining the national Norms and Standards for public school funding, (Section 35).

Two terms become the building blocks on which to base the norms and standards for public schools funding. One of these terms is “equitable” which derives from “equity”. The second term is “redress”. Foster (1990:2) defines “equity” as an act of “... creating situations in which all pupils enjoy an equal chance to maximise their potential. It means providing every individual with a chance of entering the education system. This requires the elimination of laws and barriers that bar entry of particular groups or individuals to the system.

It entails the complete removal of explicit and implicit discriminatory structures that might hinder access and progress through the system”.

The system of funding public schools in South Africa before the new dispensation witnessed gross disparities and injustices when it came to the allocation or provision and distribution of funds. The provision and allocation of public funds took on a cascading pattern with white schools being allocated a very big chunk, Coloureds and Indians following respectively and Black schools receiving a meagre share.

Davis, in Kallaway (1984: 128), traces the unequal pattern of funding between White and African schools. Looking at the financing of African education in South Africa, Davis highlighted the fact that the position of Africans was fast being eroded from 1910 to 1948. Although there was ambiguity on who should take direct control of African education, in terms of administration and financing, one thing remained certain. It was that Africans attended

segregated and sadly under-funded schools with a different set of regulations from white schools. In 1945 the union government established the Union Advisory Board on Native education. Its purpose was to advise government on matters pertaining to Native education. Between 1945 and 1953 the African education and that of Whites was financed from the same source, the Consolidated Revenue Fund. Davis, in Kallaway (1984:128) points out that before 1948, each of the four provinces was entirely responsible for the financing of African schools from its own revenue.

This pattern of funding responsibility changed in 1922, when the government passed the Financial Relations Fourth Extension Act, No. 5. This Act removed the power to directly collect taxes from Africans from the provinces. The power to directly tax Africans solely rested with the Union government. Act No.5 was passed in reaction to the Transvaal Provincial Council's decision to levy a direct education tax on Africans. The act also empowered the Union government to make additional grants to the provinces to extend and improve the African education. The four provinces understood the Act to mean that the National government had taken the full responsibility of funding African education in the preceding years. This meant that Africans, being the poorest segment of the population, would not be responsible for the financial burden of their education through taxes.

Although the government spending on African education, the growth in the enrolment, between 1925 and 1945, outstripped the growth in funds, Kallaway (1984:130). Moltano, in Kallaway (1984:69) points out that the government

was spending more than 40 times more as much on education per head of the white population than the African population. This point is supported by DDT Jabavu in his articulation that ...Provincial grants to Native education are very tiny by comparison with those for white schools and infinitesimal as compared with the enormous revenue derived from Native taxation, Kallaway (1984:69).

Although the expenditure on black education was greatly increased after the introduction of Bantu Education, the quality of education for blacks could not equal that provided for whites. As a consequent the state's funding policy was sharply criticised for making Africans, the poorest community, pay for its own education, which was not the case with whites. Malherbe (1977:142) quotes Horrel stating that ...this method of financing Bantu Education inevitably curtailed development...” Christie and Collins, in Kallaway (1984:165) state that “School facilities were limited: buildings were usually rudimentary and inadequate, and there were shortages of furniture, books, and other equipment”.

The Table below is taken from Kallaway (1984:165) to show:

The per capita expenditure (in Pounds) on schooling 1930-45

Date	Whites	Blacks
1930	22.12.10	2.02.08
1935	23.17.02	1.18.06
1940	25.14.02	2.04.04

This kind or pattern of providing funds for black schools was a recipe for stagnation as far as the development of African schooling and daily operations were concerned.

Graham-Brown (1991:155) writes that "Education has become part of the political battleground, and its transformation into a non-racial system can only be part of a much broader transformation society. Since the coming to power of the National Party in South Africa in 1948, the education system has been used as a principal instrument to anchor and sustain the apartheid system. The passing of the Bantu Education Act of 1953 created the kind of education for blacks which had limited prospects for their development and structurally entrenched their inferiority status. The creation of the Christian National Education spelt out the intention and the design to keep white people as rulers and to enhance their belief in their moral and racial superiority.

As Graham-Brown writes this practically meant the maintenance of separate and unequal schools, giving blacks and whites two different types of education, with great differences in quality and access. In actual fact, Blacks and Whites were the contending and dominant racial groups, with both Coloureds and Indians whose financial provisions were also separate and unequal. Their education, though marginal compared to that of whites, was better in quality to that provided for the black population.

Gross disparities manifested in the provision for financial resources or amounts of money per pupil for each system. Graham-Brown (1991:155)

show that in 1960/61 expenditure per capita for black education at all levels was R12, compared with R158 for each white pupil (calculated in 1988 rand). These statistics show that the provisions in South African education system were characterised by the antagonistic coexistence of highly inferior and very superior education systems for blacks and whites respectively.

Davis (1972:42) writes that the passing of the Bantu Education Act in 1953 made African education the responsibility of the Union Department of Native Affairs. It also meant that clearly Africans would have to pay for their development from their own resources.

This is shared by Malherbe (1977:557) who writes that "Bantu Education is not free in the sense that school education is free for white children".

Malherbe adds that from the introduction of Bantu Education to 1974 there was a massive increase in the number of pupils to 3, 5 millions. This led to an increase in the amount spent from R16 million to R131 million. In terms of real value of money, there was a decrease in the amount spent per African pupil between 1950 and 1970, from R9, 7c to R6, 7c in 1970, after being as low as R4, 9c in 1966 Malherbe (1972:557)

The Table below illustrates the gross disparities in funding. It reflects an inclusive Per capita expenditure on education in South Africa in rasion form:

Year	African	'Coloured'	Indian	White
1953-4	R1	R2,35	R2,35	R7,53
1969-70	R1	R4,29	R4,76	R16,59
1975-6	R1	R3,33	R4,52	R14,07

1977-8	R1	R3,43	R5.11	R12.17
1980-1	R1	R1.82	R3.69	R6.57
1982-3	R1	R3,40	R4,86	R8,27

Source: Christie (1985:100)

From the above Table, one can see how much the government spends to educate each child every year. This is called per capita expenditure, which means expenditure per person. The above Table also reflects the per capita expenditure for the different registration groups. The table shows that the amount the government spends on an African is R1. It also shows how much is spent on other groups in comparison with that R1.

If one looks across the column for 1975-6:

For every R1 spent on an African child,

R3,33 is spent on a 'Coloured' child,

R4.52 is spent on an Indian child and

R14,07 is spent on a White child.

This, therefore, means that 14,07 times more money is spent on a white child than on an African child.

These disparities did not go unchallenged by the affected sections of the South African population, especially from the latter part of the 1970s up to the late 1980s. The country witnessed strongest student protests and unrest in

1980, starting in the Western Cape and flared across the country. Among the prominent demands, there were those that called for an alternative education. The state appointed De Lange Commission in 1980 which tabled its report in 1981 with recommendations. Christie (1990:11) writes that the recommendations called for "a single ministry of education...; free and compulsory basic education for all, regardless of race, colour, creed or gender; equal opportunities and equal standards, recognition... to be financed by the state and the private sector".

Christie acknowledges that although the state increased its spending on black education, racial disparities in educational spending and provision remained. In 1986 the per capita expenditure on White education was five times more than on black education. Hlatshwayo (2000:95) writes that the government remained unshaken from its stand for separate education, while striving for parity. This reflected Nkomo's statement that education in the 1970s and 1980s became a key site in the battle or struggle against apartheid.

Nhundu, as cited by Peresuh et al (1999:165), writes that these disparities in the provision of education were not limited curricular and pedagogical issues alone, but were evident in the quality of organisational, administrative and funding provisions which were heavily in favour of the education system for whites. Nhundu was writing referring to the kind of education systems that the colonial government in Zimbabwe, under Ian Smith, had introduced catering for both blacks and whites. Nhundu acknowledges that the disparities in the provision of the pre-independent education had lasting negative

repercussions, which continued to influence post-independence funding policies and practices in education.

In Zimbabwe, during the colonial rule, government spending on African education was very low compared to that for whites. Nhundu (1999:166) observed that the disparity was reflected in budgetary allocation for the 1977/78 financial year where the government allotted a black child Z\$45,00 compared with Z\$491,00 for a white child. Between 1972 and 1977 the overall increase in government provision for a black child was Z\$16,00 compared with Z\$223,00 per white child.



Nhundu explained that in 1971 the government spent about Z\$7million and Z\$2million on its white and black learners respectively, despite the fact that the black learners outnumbered the white pupils ten times. In the light of these gross disparities and disproportionate funding levels the quality of education for African learners could not be expected to match that for whites. Any attempt to expand and improve African education could only be achieved by overstretching the already challenged African communities. This means that even though the government was highly aware of these gross disparities in the two systems of education, it was not prepared to bridge the gap. That was the responsibility of those who were at the receiving end.

The above scenarios give an identical picture of the background and experiences which black learners endured, though the countries are different and are thousands of miles apart. African communities in both countries had

to meet the basic needs for their children that their respective governments failed to provide for.

Harber (2001:7) stresses that educational reform was high on the agenda of the first democratically elected government after April 1994. The reform and transition in the educational system from the old pattern to the new, as far as the budget process was concerned, was not an easy effort. The Government Gazette (1995:57) states that "... the necessary shift in the budgetary allocations on to an equitable basis of provision has undoubtedly created severe pressure..." It goes on to compliment an intense effort made by all concerned to achieve a result which does justice to the complexity of funding educational transformation against the inheritance of extreme disparity of provision, and this involved the making of extremely painful choices.

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Botha in Pretorius (1998:64) states that the State is facing a tremendous task of financing education at the national or macro-level so that proper teaching and learning can take place. Prior to 1994 the entire South African education system, including education departments, financing... was based on racial lines. The post-1994 dispensation witnessed a shift, as van Wyk (1998:13) puts it, from a racially differentiated system to a geographically differentiated system. This shift was represented by the establishment of a national department of Education and the nine provincial departments of education.

Claassen (1995:203) writes that people pay for something they perceive to have value. Money is invested in education because it is perceived to have

value. This, therefore, means that education is financed or funded because education has both individual and social benefits.

Botha, in Pretorius (1998:64), identifies examples of individual benefits of education as individual empowerment through the development of a person's personality, his/her critical insight and by providing a person with appropriate skills from which he/she can earn a living. Examples of social benefits of education are that a literate, educated population leads to stability in a country and the economy benefits from skilled, educated people. Illich (1971:1) cautions that not all people automatically believe formal education is valuable, and such people have their reasons to support their argument. Nevertheless, Botha believes that the majority of people worldwide believe that education has sufficient value in order to invest in it. This is supported by the fact that national education systems exist in all countries of the world.

Claassen (1992:106) gives a distinction between private or individual funding and public funding. Individuals spend their money on goods and services, such as education, that they feel necessary. Examples of such private spending in education are:

- School fees contributed by parents at public schools; and
- Opportunity costs borne by the learner and parents, for example, the cost of transport, textbooks and school uniforms.

Public funds are used to establish a public education system that provides access to education for all learners. Botha, in Pretorius (1998:65), illustrates how public funding works: in that citizens in a particular society pool a

proportion of their income and collectively spend the money on goods and services which are regarded as necessary for all the citizens in the society.

Simply put the government collects the money from the people through taxes and redistributes it according to needs and priorities. Botha highlights that the level of state funding differs from one country to another. For example, a developing country, like South Africa, seeing a direct correlation between education and national development, may spend a large sum or part of its budget and its GNP on education. On the other hand, a developed country, like the United States, that has an adequate infrastructure operating and wants to reduce the role of the state in funding, may spend less on education. Botha in Pretorius(1998:64-65).

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Both Botha and Claassen, in Pretorius (1998:66&126), write that in South Africa education usually takes up 21%, the biggest chunk, of the national budget. For example, Claassen states that in 1997 South African education budget was allotted R39 billion which is 21% of the overall budget of R186 billion. Botha divides the budgeting process into three phases:

- The drawing up of a draft budget:
- Approval of the budget: and
- Implementation of the budget.

During the drawing up of a draft budget, the Department of Education draws up and substantiates an estimation of its expenses in terms of human needs and the objectives it wishes to attain.

The Education Department submits the draft to a co-ordinating body or the department of Finance together with the drafts budgets of other departments.

The Department of Finance then submits the budgetary proposals to the Legislature in terms of the financial policy of the country.

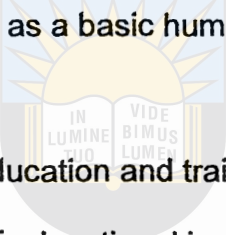
The second step which includes the approval of the budget is conducted by the highest authority, a Parliament, in terms of a specific parliamentary statute. Approval of the budget authorises department to incur approved expenditure.

The third step involves the implementation of the budget. It is important to note that funds are voted for estimated expenditure. It is crucial that funds are spent judiciously and only for very sound reasons. At this stage it is important to exercise the necessary financial control. This refers to the ways in which school funds may be collected, kept and spent as laid down in parliamentary legislation (RSA, 1996(a):26).

Then the allocation of funds to the nine provincial departments of education is determined by the National Department of Education, by using a subsidy formula. This subsidy formula serves to make appropriate annual estimates for individual education departments. There are a number of educational factors which necessitate that the democratic government of South Africa spends vast financial resources.

Botha, in Pretorius (1998:68) enumerates them to include the following:

- It is constitutionally bound to principles such as equality, redress and reconstruction and development, which have excessive and vast financial implications.
- Its educational policy commits it to values and principles which require vast financial resources. The values and principles of education in a new, democratic South Africa include the following aspects:

- 
- education as a basic human right, to be advanced by the state:
 - lifelong education and training of good quality:
 - redress of educational inequalities:
 - resources to be equitably deployed:
 - access to education opportunity of good quality to all children, youth and adults.
 - the improvement of the quality of education: and
 - the rehabilitation of schools and colleges and restoration of a culture of teaching and learning.

These are but few in a vast number of factors that influence and inform the state in its financial provision for education. Botha, in Pretorius (1998:69), points out that many newly independent African countries had similar lofty goals, but budgetary constraints have prevented these countries from achieving their worthy goals. They had to prioritise aims and finance education accordingly.

The task of financing education comprises a number of aspects, which include the following:

- at national level the government, when dealing with education budget, is guided by two significant norms in establishing the national budget:
 - Equal funding for all race groups. In order to achieve this the level of funding will be well below that of schools previously administered by the former House of Assembly (white schools), but above that of schools of the former Department of Education and Training (Black schools)
- The income that is raised is distributed to all provinces. This distribution will not be on an exact per capita ratio. This means that if the Northern Province and Western Cape have the same number of learners, the Northern Province may have a bigger allocation from the central government for two reasons:
 - Redress: educational backlogs are much bigger in the largely rural Northern Province, needing more expenditure. The principle of equity applies in budgetary allocations to provinces. Pretorius (1998:69).

Kaobe (2001:3) highlights the fact that the explicit aim of education policy since 1994 has been to achieve equity and redress.

This necessitated that dramatic changes be applied, which included the formulae for provincial educational allocations. To achieve redress, the government attempted to shift resources from well-endowed provinces to needy ones, as a result poorer provinces benefited well from the share allocations. The government has also developed school funding norms with the express purpose of further ensuring that the poorer schools receive the largest slice of resources.

Botha, in Pretorius (1998:69), identifies three options for school funding which are considered in the so-called Hunter Report.

These options are:

- A minimalist-gradualist approach which applies the implementation of a school model almost similar to former model C schools in terms of their financing;
- An equitable school-based formula approach which operates almost the same as the above approach, but differ in the aspect of that the state's per capita allocation can differ according to the conditions of the school; and
- A partnership funding approach which stresses the co-responsibility for the funding of schools to be contributed by other role player such as parents.

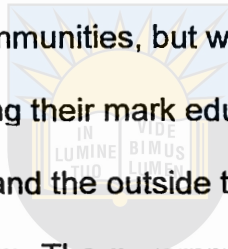
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The system of funding black schools, particularly schools in the rural areas, did more damage than good. The lack of proper and sufficient funds caused such a drawback not only in the physical appearance of the school buildings, but also in the daily operational activities of the schools. The inward appearance of the classrooms where proper and quality teaching and learning was supposed to take place was not good at all. There were no Libraries, no electricity, TV sets, and no laboratories. The poor funding of black schools affected the rendering of quality operational activities of these schools.

The lack of funds made it difficult for the classrooms floors to be covered with mat. The majority of rural schools used to apply cow-dung to refresh the floors which were in most cases marked by holes. Desks and classroom doors were in a state of dilapidation. There were not enough chalkboards and a rife shortage of chalk. Schools could not afford to purchase radios, as these were very useful for educational programmes and in exposing learners to English and Afrikaans speaking stations. In most cases broken window-panes were replaced by cardboards. Many schools did not have toilet facilities, and those that had, were completely dilapidated, unusable and a hazard to learners. Drinking water was only available from nearby dams, which posed health hazards to pupils, because schools were not able to purchase water tanks. There was no proper fencing around the school yards.

The funds that were collected through fundraising activities, such as concerts, bazaars and ruffles, were not enough to take care of the backlog of things that needed to be fixed. Those parents that afforded to pay school fees contributed the little they had. Apart from the school fees that had to be paid,

parents had to buy stationary because, unlike in white schools, black schools were not provided for. The shortage of textbooks and other school books, due to overpopulated schools, had an effect in the teaching and learning activities. This had a bearing on the quality of results of rural schools. The provision of funds for black schools was not meant to develop these schools, by imparting knowledge, skills and life long learning commitment, but to mould and develop them into accepting that they belong to a very inferior stratum in the South Africa society. That system of funding was moulded in such a way that it would not only frustrate black communities, but would also discourage them from imagining themselves making their mark educationally. A look at the school environment, both inside and the outside the classrooms, one could see a gloomy picture and boredom. The government did nothing to create conditions which were conducive enough for the culture of teaching and learning.



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SUMMARY

The above scenario draws a picture of how public school funding was arranged and effected during the apartheid dispensation. It shows that the allocation of funds for South African schools was determined and informed by the racial policies of the day. This pattern of racially determined funding placed non-white learners, Black learners in particular, at a disadvantage. These disparities in funding resulted in stagnation and underdevelopment as far as black education was concerned. Black schools, rural schools in particular, lacked proper educational resources that could enable these schools perform on the same par as schools in townships. Schools found it very difficult embark on their daily activities under such strenuous conditions. The communities that were serviced by the schools were too poor to make a meaningful financial supplement towards the school fund.

The system of Norms and Standards of Funding in the following chapter seeks to show how the government attempts to ramify the disparities in the funding system of the previous government.

CHAPTER THREE

THE NORMS AND STANDARDS OF FUNDING

INTRODUCTION

This chapter looks at the introduction of the introduction and application of the national system of norms and standards of funding for public schools. It focuses on the criteria to be followed in categorising schools into Quintiles. It also looks at how funds are allocated for Sections 20 and 21 schools. Among other aspects that this chapter focuses on are: the planning of the budget; the spending of the budget; financial reporting and the summary.

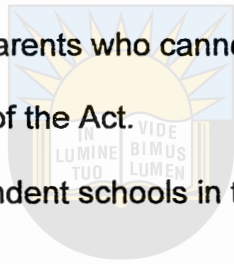
3.1 THE INTRODUCTION OF THE NATIONAL NORMS AND STANDARDS FOR SCHOOL FUNDING

Government have adopted the partnership funding approach as a model to apply when funding public schools. This is based on the idea that the provision of quality education for all at no direct cost to parents and communities is not affordable in terms of budgetary allocations to education. The Gazette (1995:67) states that "... provincial governments have a constitutional responsibility for establishing, running, regulating and financing schools, but they will do so within the framework of national policy on matters such as the legal status of different types of schools, and the norms and standards by which they should be governed and financed". This, therefore, gave birth to a policy document, which came into effect in 1999, called the

Norms and Standard for National School Funding which deals with the financing of public school in the post-1994 South Africa.

According to the Government Gazette (2006:5) these norms and standards deal with:

- How the state must fund public schools, in terms of Section 35 of the South African Schools Act, 1996.
- The rules for exempting parents who cannot afford to pay school fees in terms of Section 39(4) of the Act.
- State subsidies to independent schools in terms of Section 48(1) of the Act.



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According to the Resource Pack for School Principals (:3) the Norms and Standards policy does not apply to:

- Funding for school personnel,
- Provincial expenditure for school-related administrative and development,
- Schools for Learners with Special Needs, and
- Funds raised by schools through their own efforts.

The policy of norms and standards for funding schools came into effect in 1999. This policy was amended in August 2006, coming into application in January 2007. Focus will, therefore, be given to the Amended Norms and Standards as contained in a simplified version in the Resource Pack.

According to the Principals' Resource Pack "Norm" means a rule, a pattern, or an accepted standard. A 'norm' is what is expected as the average, or normal, in our schools. A 'Standard' is a model or principle by which other things are judged. The Norms and Standards therefore set out the minimum standards for school funding.

The Norms and Standards for Funding are informed by the principles which are contained in the Bill of Rights as contained in the Constitution of the Republic of South Africa, 1996 (No. 108 of 1996). These principles state that:

"Everyone has the right.....

- a) to a basic education, including adult basic education; and
- b) to further, which the state, through reasonable measures, must make progressively available and accessible" (section 29 (1)).

The South African Schools Act of 1996 states its principal objective as follows "to provide for a uniform system for the organisation, governance and funding of schools". This means that " the state must fund public schools from public revenue on an equitable basis in order to ensure the proper exercise of the rights of learners to education and the redress of past inequalities in educational provision" (section 34(1))

According to the Constitution the state must provide resources on a progressive basis in order to safeguard the rights to education of all South Africans. The challenge facing the state is that educational needs far

outnumber the available resources. This, therefore, means that priority funding must target the needs of the poorest. The Norms and Standards provide a framework for funding that favours poor communities the most. According to the Yearbook(2007/2008:177) this system of funding is progressive, in that, 60% of a province's non-personnel expenditure goes to the poorest 40% of learners in public school, and the poorest 20% of learners receive 35% of non-personnel resources, while the richest 20% receive 5%. To enhance the attainment equity in funding ordinary public schools, the school-funding norms provide for full, partial and conditional exemption for parents who cannot afford to pay school fees, thus ensuring that learners with financial difficulties cannot be denied access to education. The Provincial Government and the Legislature are responsible for deciding on the education budget. They decide as to what proportion of the total provincial budget must be allocated to education. The Amended Norms and Standards specify per-learner target for that part of the education budget that deals with recurrent expenditure at schools.

The Norms and Standards deal with non-personnel costs and it note that the allocation of non-teaching costs is extremely uneven and this affects the efficiency of disadvantaged schools. The non-personnel costs include these categories:

- New classrooms and other constructions,
- Immovable capital improvements and repairs,
- Recurrent costs easily separated from other costs,

- Other recurrent and minor capital equipment costs
- Hostels

These costs are separated into two main categories:

Capital costs: these are related to new classrooms and other constructions, including

- Provision for water, electricity, and telephone installation services.
- Connections to main services where these are provided to school site.

The Provincial department must target the construction of classrooms, new schools and facilities to the neediest population.

Recurrent costs: these are immovable capital improvements and repair costs, which include

- Learner support materials, such as, textbooks, stationery etc.
- Small capital equipment costs, such as. Computers or photocopiers
- Easily separable recurrent costs including expenses for supplies and services, such as, monthly electricity or telephone bill, cleaning materials, etc.

From the total provincial education budget 80% is allocated for personnel costs and 20% goes to the non-personnel category, which comprises capital expenditure and recurrent expenditure.

The state allocates a certain amount of funding to each public school. This money is for covering key inputs, such as, textbooks, stationery, cleaning materials and electricity costs. Under normal circumstances these costs are supposed to be covered by schools fees, but some communities are too poor

to afford even a portion of these costs. The Amended Norms and Standards do not prescribe as to the needs to be covered by these allocations, because schools needs vary from one school to another. The allocation is earmarked to cater for non-personnel recurrent items and small capital items, including repairs and maintenance. It is primarily and exclusively meant for the promotion of quality education in public schools. This policy makes it clear that it is not intended to cover costs of personnel and new buildings.

The process of allocating funds to schools goes as follows. The Education Department of the Eastern Cape must formulate a "Resource Targeting List" of all the schools in the province, based on poverty criteria. The Education Department goes on to rank all the schools from the poorest to the least poor. The rationale behind this process is for the poorest schools to get the most resources.

This formula includes both section 21 and non-section 21 and 20 schools. Section 21 schools are self-managing schools. According to this formula each school in the province is allocated a per learner allocation for funding. Each school is awarded a poverty score based on the relative poverty of the community around the school. This awarding is based on the national data usually the National Census conducted every five years by Statistics South Africa.

The important points that are taken into account are:

- Household or individual income of the community in the school's catchment area,

- Dependency ratio (the proportion of income earners to people who are dependent), or unemployment rates,
- Level of education of the community.

All the schools are then listed in rank order and the list is divided into five quintiles, from the poorest to the least poor. The distribution per quintile will determine the per learner allocation. One of the weaknesses of this system is that each school is allocated funds according to the enrolment. This means that a school with a less number of learners will receive fewer funds.

What marks the difference between the Norms and Standards of 1998 and the Amended Norms and Standards of 2006 is that the latter considers the different provincial poverty levels.

The table below depicts the Eastern Cape poverty distribution Table which compares the distribution determined by the Amended Norms and Standards and the distribution determined by the Norms and Standard of 1998:

QUINTILES	AMENDED N&S(2006)	DISTRIBUTION N&S 1998
QUINTILE 1 (Poorest)	34,8% of schools	20%
QUINTILE 2	21,6%	20%
QUINTILE 3	21,0%	20%
QUINTILE 4	11,6%	20%
Quintile 5(Least poor)	10,9%	20%
TOTAL	100%	100%

Many schools are allocated to the poorest quintiles, and few schools to the least poor quintiles. The above table reflected a reality that before 2006 the majority of learners from poorer communities were not all catered for by system of funding. The distribution table reflected 20% of funding allocation across the board, meaning that all the schools received equal allocation of funds, including those that were on least poor quintiles. For example, in Quintile 1 before 1998 only 20% of learners were covered by the funds leaving about 14, 8 learners not catered for. This meant that the majority of poor schools continued to suffer. Furthermore, the system of Norms and Standards of Funding did not allocate funds per learner, as a result a lot of schools experienced acute shortage of funds. The poverty distributions are reviewed yearly.



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The Amended Norms and Standards policy tables targets for funds that provinces should spend on learners in each quintile from 2007 to 2009:

QUINTILES	2007	2008	2009	% possible fee exemption
Quintile 1 (poorest)	R738	R775	R807	100%
Quintile 2	R677	R711	R740	100%
Quintile 3	R554	R581	R605	100%
Quintile 4	R369	R388	R404	67%
Quintile 5 (least poor)	R123	R129	R134	22%
No fee threshold	R554	R581	R605	

The table above illustrates that the target for learners in the poorest quintile will be R738 per year in 2007, whereas the target for learners in the least poor quintile will be R123 per year. It also depicts that all learners in the first three quintiles could possibly be exempted from paying school fees.

In quintile 4 the school fees can cover 33% of the learners' needs, and 67% of learners could be exempted from paying school fees. In quintile 5, if school fees are charged, then 22% of learners could be exempted. In reality the money may not be enough in the provincial budget to cover the target. In that case, the Amended Norms and Standards states that among other efforts solve the challenge, quintiles 1 and 2 will be first priority for funding.

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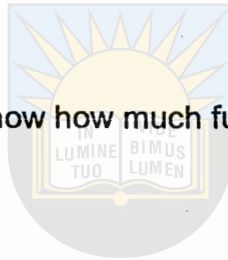
The National Minister of Education will publish information about school allocations on a three-year span. The minister will also make known information on which quintiles will comprise no fee schools. Then each provincial Education Department will assume the responsibility of working out provisional allocations to each school for the next three years. This exercise will be based on the following:

- The information from the Minister about school allocations targets,
- Data on school poverty (the poverty ranking of schools and their quintiles),
- Enrolment data for each school, and
- Provincial budget data.

The Provincial Education Department must then communicate the provisional allocations to the schools by September every year. Each school must know:

- Which national quintile the school falls into;
- The national per learner target for the quintile;
- The Minister's rationale for the targets;
- The national no fee threshold;
- The calculations performed by the province to arrive at each school's allocated amount.

Each school in the province will know how much funding per learner to expect in the next three years.



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The schools will report on how the allocation supports the school development plan, quality education and learner achievement. The National and Provincial Departments of Education must give a report on the determination of school allocation every year, and make recommendations for the further enhancement of school effectiveness and learner performance. The District office exercises administrative controls to ascertain that the school allocations are spent by the schools they are allocated for, and must be spent for the allocated purpose. It is worth noting that the schools with fewer enrolments receive less than those schools with more enrolment. The fact that schools are not allocated funds according to their needs but the enrolment, further marginalise rural schools because most of them have lost their enrolment to urban and township schools where conditions are better off.

3.2 CATEGORISATION OF PUBLIC SCHOOLS

The South African Schools Act divides public schools into two categories:

- Section 20 schools: they are allocated funds according to a paper budget. The funds are kept by the district office and all expenditure has to be requested through the district office according to departmental arrangements.
- Section 21 schools: these are self-managing schools. They are allocated funding for recurrent costs directly into their school account. They are responsible for budgeting, spending the money according to the correct allocation, and reporting to parents and to the department on how money has been spent.

This categorisation guides the department in its preparation for the allocation of funds for the two categories. Since school needs vary from school to school, this categorisation also affords each school some level of independence in dealing with its own needs without the department interference.

The department believes that it is important that all public schools become Section 21 schools because:

- This allows greater efficiency for the educational system as whole. The fact that Section 21 schools manage themselves frees up resources for other work.
- This give schools the opportunity to manage their own affairs and determine their own futures,

- It allows schools to take account of their own particular contexts and circumstances in their own school development plans; and
- Develop accountability and self-responsibility at school level.

District officials should ascertain that Section 21 schools receive regular and appropriate monitoring and support.

Section 21 status goes with additional responsibility and additional functions which include these:

- To maintain and improve the school's property, and the buildings and grounds occupied by the school. This requires that there be a plan for improvements which should form part of the School Improvement Plan, and the annual school budget.
- To purchase textbooks, educational materials and other equipment for the school. This must be the responsibility of the LSM Committee which must draw up guidelines for choosing, distributing and controlling the use of support materials. There must also be a stock register which must be kept up to date.
- To pay for services rendered to the school by outside service providers. The school must have an effective financial system to manage this function. It must budget effectively, monitor the income and expenditure, and make sure that the services can be paid for. The finance committee must be familiar with accounting procedures and have or keep detailed and up-to-date financial records.

These additional responsibility and functions help these schools to focus on their needs with intention to better the conditions of their schools. Schools must be able to identify their weak and strong areas so as to improve their lot. Schools must be able to use their funds in a constructive way that will make their operational activities to be hurdle free. The department officials must see and ascertain that the allocated are used by the schools for their development and upgrade their standards so that they can attract the big number of learners who left their school back. The department of Education has a responsibility of making enough funds available to public school so that they are able to use such funds to redress the ravages of the apartheid era.



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3.3 PLANNING THE BUDGET

The state allocates a certain amount of funding to each public school, to cover key inputs other than personnel and capital costs. Some examples of such key areas include textbooks, stationary, cleaning materials and electricity costs. Some communities are too poor to undertake even a portion of these costs. The state must ensure that the school allocation is sufficient to cover the needs and rights of poor children to a good education. The allocation of funds by the state follows this pattern:

- Section 21(self managing) schools are allocated funding for recurrent costs directly into their school account. They are responsible for budgeting, spending according to their correct paper budget allocation

and reporting to parents and the department on how they have spent the money.

- Non-Section 21 schools are allocated funds according to a paper budget. The funds are held by the District Office and all expenditure has to be requested through the district office as per protocol. This means that the district office has a special task to monitor budgets and spending of Non-Section 21 schools.

According to the Amended Norms and Standards policy targets that provinces should apply on learners, the target for the learner in the poorest quintile is R738 per year since 2007.

The Department of Education provincially follows a formula which it uses to rank all the schools, in the province, from the poorest to the least poor. The poorest schools are then targeted to get the most resources. To get the formula right the Department uses the data from national Census and looks at the following scenarios:

- Household or individual income of the community in the school's catchments area,
- Dependency ratio, or unemployment rates,
- Level of education of the community.

Once the schools are listed in rank order, the list is divided in five quintiles from the poorest to the least poor. The distribution per learner determines the per learner allocation.

According to Section 38 of the South African Schools Act all schools must prepare a budget each year and this must be approved by the school's governing body after it has been presented to an annual general meeting of parents.

The school's budget must be informed by the following:

- Set goals;
- Identification of needs;
- Identification of other cost factors,
- Assessing possible income; and
- Consulting widely



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The Provincial Education Department states that the allocation of funds is meant for:

- Learner Teaching Support Material so that both the learners and the Teachers must have proper and necessary material for day-to-day business to take place. This material will serve to lift up and improve the standard of school results.
- Municipal Services which must make sure that there is electricity, water and other necessary things that make it easy to run the school.
- Essential day-to-day maintenance of school building; grounds and equipment;

- Stationary;
- Educational consumables; and non-educational consumables.

All the different kinds of materials are a necessity in the daily business of the school community. In the past the majority of schools in the rural areas did not have these services and had an acute shortage of teaching and learning material.

This is the list of examples of items that the school allocation may cover:



1. LEARNER TEACHING SUPPORT MATERIAL

- Textbooks;
- Library books;
- Charts;
- Models;
- Computer hardware and software;
- Television;
- Video records/ Tapes;
- Hospitality equipment;
- Consumer study equipment ;
- Clothing and Soft furnishing production;
- Laboratory equipment;
- Musical instruments;
- Learner desks, chairs.

2. CONSUMABLE EDUCATIONAL ITEMS

- Stationary for learners;

- Science laboratory chemicals;
- Art equipment;
- Ingredients for Consumer Studies and Hospitality Studies.

3. NON-EDUCATIONAL ITEMS

- Stationary for Office use
- Cleaning materials & equipment
- Lubricants;
- Food;
- First Aid Kits.



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4. NON-LEARNING TEACHING SUPPORT MATERIAL

- Copier machines;
- Telephone sets;
- Fax machines;
- Intercom system;
- Hardware tools;
- Sporting equipment;
- Electrical equipment.

5. OTHER SERVICES

- Workshop fees;
- TV licences;
- Telephone calls;

- Electricity calls;
- Water;
- Electricity;
- Copy services.

The district officials must ascertain that, when schools submit their budgets, the School Funding allocations have actually been allocated to the above items.

Once the funding allocations have been made, the allocation amounts must be communicated to the schools so that each school can prepare its own budget for the next financial year. For Non-Section 21 schools district officials must help and advise these schools on how to plan, spend and monitor their paper budget. District officials have the responsibility to help capacitate schools in the following competencies:

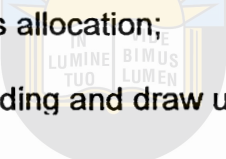
- Each school must be able to account on how the allocation is spent;
- To clearly define roles and responsibilities;
- Table a clear and detailed budget planning that reflects the goals and operational requirements of the school;
- To devise internal control systems with checks and balances to ensure that all financial transactions are reliable and accurate;
- To make accurate and reliable record keeping;
- To ensure reliable procurement procedures;
- To be able to control expenditure;
- To formulate and apply risk protection measures;
- To exercise stewardship of assets;

- To strictly control petty cash; and
- To invite external monitoring, reporting and checking.

Schools must spend the full allocated amount in the financial year as it will not be carried over to the next or following financial year.

3.4. SPENDING THE BUDGET

For Non-Section 21 schools the allocations are maintained, disbursed and monitored at the District. Procurement procedure takes the following steps:

- 
- The school is informed of its allocation;
 - Schools prioritise their spending and draw up a budget
 - They forward a requisition on the budget items to the Department;
 - The Department approves their order and the school submits the order to the supplier;
 - The goods are delivered to the school and must be checked and signed for;
 - An invoice is received and must be submitted to the district for payment;
 - The value of the goods is deducted from the school's funding allocation;
 - The Districts informs the school when payment is made and the school updates its financial records.

The district and each school must always record how much has been spent, when and on what.

Section 21 schools receive their allocation directly into their account. They are fully responsible for procuring their goods, paying for them, and monitoring their financial controls themselves.

3.5 FINANCIAL REPORTING

Schools must give a report on their expenditure to the district on a quarterly basis; the report must be accompanied by photocopies of the most recent bank statements. According to Section 37 of the South African Schools Act, all money received by a public school, including school fees and voluntary contributions, must be paid into one school fund.

The Quarterly Financial Report consists of two sections or parts:

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- Part A deals with the income and expenditure of the school allocation. All schools must fill in this section, both Section 21 and Non-Section 21 schools.
- Part B deals with self-generated funds and their expenditure. This may include income from fees, from donations, fundraising activities and others. Appendix IV contains Quarterly Financial Report form for public schools which they have to use when accounting for school finances.

The District official must scrutinise each financial report and ask questions about the school allocation:

- Has the school received the correct school allocation, and at the correct time?

- Is the school spending the allocation for the line items it was budgeted for?
- Are there any significant variances?
- Is there a total surplus or deficit?

The majority of rural schools are classified on Quintile 1&2 as determined by the poverty index. Although these schools receive their allocation each year, in practical terms the allocation is not enough to completely remove all the signs of the ravages cause by the old system of funding. Another weakness of the new system is that it uses the present enrolment to determine the provision and allocation of funds for the preceding year, ignoring the possible increase in the enrolment in the following year. This put the school at a disadvantage especially if the enrolment increases, because it has to operate with funds that were catered only for fewer learners.

3.6 SUMMARY

The introduction and implementation of the system of Norms and Standard for Funding, and its Amended version was aimed at mending the ravages of the apartheid versions of funding. Under apartheid racial policies were used to determine how much funding could be allocated for black schools. Under the new post-1994 system of determining funds to all public schools data was collected which led to the quintiling of schools. The process of categorising schools into quintiles was informed by the data collected about the conditions under which the communities that are serviced by the schools live. The allocation of funds is based on an equitable level in order to bring about equity in funding and to redress the past disparities in funding. The Amended Norms and Standards for Funding focussed on the allocation of funds per learner per school as determined by the living conditions in that particular vicinity.

The success or the failure of the system of Norms and Standards of Funding in redressing the past injustices in funding will be determined by the data collected and synthesised in the following chapter.

CHAPTER FOUR

RESEARCH METHODOLOGY

4.1 INTRODUCTION

This chapter deals with the strategies that the researcher implemented to investigate the problem statement in order to arrive at the drawn findings and conclusions. It looks at the plan of actions that was applied in collecting the necessary and relevant data and how the participants were involved in the research effectively.



4.2 RESEARCH DESIGN

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The researcher implemented non-experimental research techniques in this study because the topic deals allocation of funds and their usage which vary from one situation to another. This, therefore, means that the findings cannot be subjected to scientific laboratory test, but are points of views of respondents and participants from different levels of the research population. The research applied both qualitative and quantitative methods in collecting and analysing the data that was required for the execution and achievement of the objectives of the research. The researcher collected data from sources that included:

- Books.
- Articles published in journals.

- Periodicals and magazines,
- Reports and published statements by Government and non-government bodies,
- Circulars issued by the Department of Education both nationally and provincially,
- Newspaper articles and editorials.

This means that the researcher consulted extensively collecting data for the study. The primary data source was a questionnaire that was completed by the selected school teachers, principals and officials from the Department of Education respectively. This means that the questionnaire was designed and divided into three sub-themes relating to the three components, but still relevant to the topic that evaluates the effectiveness of the system of norms and standards for funding to redress the past injustices caused a segregatory funding system. Complementary qualitative data was collected through interviews that were conducted with the teacher-part of the SGB in selected schools around the King William's Town and Stutterheim areas. These teachers were able to provide explanations on the impact and effectiveness of the new system of funding in redressing the ravages of the past system of funding. These teachers together with the principals from the selected schools were able to provide a comparative approach between the old system of funding and the system in the new dispensation, after 1994. The interviews were also conducted with the representatives of the teacher unions, who helped to shed light on the status quo as far as effectiveness of the system. Interviews conducted with principals; teachers and representatives of teacher-unions reflected complementary responses of agreeing.

Interviews which were conducted with the officials from the Department, such as the Monitor of the Norms and Standards of Funding and the Circuit Manager for Circuit 12, painted a picture different from the one painted by school-based educators.

4.3 POPULATION

The sample population was drawn from the district officials of the Department of Education, the representatives from the teacher-unions, school principals and teacher-component of the SGB from schools that are located in the King William's Town and Stutterheim areas. From the district office there were two respondents who were personnel in positions of responsibility. The number of schools in the King William's Town and Stutterheim areas is over 150, which is too much for the research. This necessitated that a pool of 50 schools be formed, and from that pool only 15 schools were selected for the research purposes. The number of 15 schools included schools situated both in the rural areas and farms. The selection of these schools followed a process of random selection and it followed this pattern, two farm schools; six primary schools and seven secondary schools. This, therefore, means that all the schools had equal chances of being selected or missed out. The criteria that were followed during selection were that:

- These schools are situated in the rural and farm areas,
- Were built during apartheid era,

- Are for previously disadvantaged and marginalised communities, and
- Were funded by the government.

In selecting respondents from farm schools only 2 were selected, with 2 educators from each, giving a total of 4 educators or respondents from this category. The remaining thirteen rural schools had 26 respondents selected which added up to the 15 Principals and two officials from the Department of Education selected giving a total constituency of 45 respondents. The remaining thirteen schools were further classified into primary and secondary schools.



4.4 SAMPLING

In an attempt to obtain balanced and authentic findings a stratified sampling procedure was followed. The organisational structure of the department of education follows a hierarchical pattern which is characterised by a chain of command from the District level, Circuit down to the school levels. The respondents were selected and interviewed according to their respective levels of seniority. From the District level the official interviewed was the Monitor of the Norms and Standards of Funding, and the Circuit Manager of the selected schools. At school level the Principals of the selected schools and the teacher-component of the SGB were provided the questionnaire and also interviewed. The questions contained in the questionnaire varied from one category of respondents to the other.

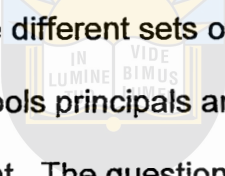
4.5 SAMPLE

A total 47 respondents completed the questionnaire and were interviewed. These respondents were 15 principals, 30 teachers from the SGB, and 2 district-based managers. These district-based managers were the Monitor of the system of Norms and Standards of Funding and the Circuit Manager who is responsible for the selected schools. Schools were classified into primary schools, secondary schools and farm schools. The rationale behind the classification was to verify the uniformity or disparities of policies dealing with the provision and actual allocation of funds to schools in these three categories and to gauge the effectiveness of the system of funding in all the three categories respectively. These three categories were equally subjected to a rationally determined system of funding and were similarly affected. This, therefore, means that the effectiveness of the new system of funding had to reflect on all three of them, because the new system was based on equity in funding and redress of the effects of the past system of funding.

4.6 PROCEDURE

Firstly, the researcher asked for permission from the EDO, through correspondence, to conduct research on the selected schools. Secondly, the researcher approached the Monitor of the system of Norms and Standards of Funding public schools in the District, following the procedure of correspondence. Both the EDO and the Monitor, respectively, responded in writing. The EDO gave a go-ahead encouraging that the research will be

worth its while, particularly in assisting the District and the Province as a whole. The EDO also recommended that the researcher should make own arrangements with school Principals and the teachers concerned after school hours. The researcher then went on to write letters seeking permission from selected school Principals to conduct research at their schools. The Monitor was enthusiastic about participating in the research and promised to be helpful all the way. The researcher made use of telephone calls to secure appointments with principals of various schools.



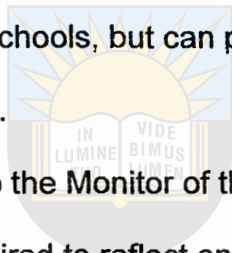
The researcher then prepared three different sets of questionnaires, specifically for the Monitor, the schools principals and for the teachers that deal with the funds and procurement. The questionnaires were sent by hand with letters to the principals asking for permission. Principals of selected schools were requested to distribute the questionnaires to the teachers concerned. The researcher phoned the principals concerned to establish whether the questionnaires were completed and ready for collection and finished collecting them. Delays were experienced in terms of getting data collected on time, due to the end of the year school commitments and responsibilities.

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4.7 INSTRUMENTS

The researcher implemented two instruments in completing this research study, apart from consulting books and other written sources. The primary instrument that was used was a questionnaire. Three different questionnaires

were prepared by the researcher, were then distributed to the selected respondents. The first was directed to the school Principals concerning their understanding the system of Norms and Standards of Funding and its effectiveness in the carrying out of the daily operational activities and redressing the damages of the past system of funding, the quintiles in which their schools were each placed, the areas of strength and of weakness in the new system and identify what has been repaired by the system. The second questionnaire was sent to school teachers who are not only hands on in the daily operational activities in their schools, but can pick it up whether the school is improving or deteriorating. The third questionnaire was sent to the Monitor of the system of funding and the Circuit Manager who were required to reflect on the effectiveness of the new system of funding in the public schools.



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As second instrument interviews were conducted with Monitor and the Circuit Manager. It was necessary to conduct interviews in order to meet and converse with them so as to understand their operations and practices from their positions. This offered an opportunity for questions to be asked and answered and all clarity be obtained on the application of the new system of funding from its beginning in 1998 and its amendment in 2006.

4.8 DATA ANALYSIS

A descriptive approach was applied to analyse and describe the responses according to the sequence and the chronology of the research variables. As point of departure, a top-down sequence of analysing responses was employed. The first questionnaire was the one filled by the Monitor of the Norms and Standards of Funding. The responses were recorded, step by step under each of the questions. This was followed by a brief summary showing the researcher's analysis. The following set of questionnaires was addressed to school principals and their responses were clustered as secondary, primary and farm schools. The third questionnaire was addressed to teachers dealing with funds and procurement, and their responses were clustered in the fashion of questions given to principals. The last schedule to be analysed was a checklist that was distributed to check and verify the availability of resources for both educational and non-educational purposes. This variable was measured in terms of indications by a 'Yes' or a 'No' answer. The responses collected were then analysed, scrutinised and interrogated, and the findings were arrived and conclusions were made.

4.9 PROBLEMS ENCOUNTERED IN THE RESEARCH PROCESS

There were some challenges faced both in the distribution and collection of the questionnaires. Some school Principals were very reluctant to get involved in the research due to the timing, that is, the period in the year in which the research was conducted. Many schools were very busy preparing for the end-

of the year examinations, so principals of the schools concerned feared that the research would consume a lot of their time, or delay those educators that were going to take part in the research. There were also delays in returning the completed questionnaires.

4.10 CHAPTER SUMMARY

The research rested on a non-experimental approach and the primary tool for data collection was a questionnaire which varied in from the Monitor of the Norms and Standards of Funding, the school Principals, and the teachers dealing with funds. The questionnaires applied to Secondary, Primary and Farm schools which fell under state provision. The complementary interviews were also conducted with the Monitor and the EDO. Responses from all respondents were recorded and analysed.

The data that has been collected, sifted and analysed in this chapter will be interpreted in the following chapter to determine whether the new system of funding for public schools is effective or ineffective in redressing the past injustices in funding.

CHAPTER 5

DATA ANALYSIS, RESULTS AND INTERPRETATION

INTRODUCTION

This chapter deals with the presentation and interpretation of the findings on the effectiveness of the new system of Norms and Standards of Funding for public schools. The responses that will be presented by the participants will determine and indicate whether the present system of funding is effective and doing enough to redress the past injustices of the previous system of funding. These responses, ranging from those of the Monitor to those of the Principals and the Teachers dealing with funds, will be tabulated and analysed.

5.1 RESPONSES AND INTERPRETATION

Structured questionnaires containing open-ended questions were distributed to two district officials in the King William's Town District of the Eastern Cape Department of Education. These officials were the Monitor of the Norms and Standards of Funding and the EDO of circuit 12. The questions contained revolved around determining whether the current system of Norms and Standards of Funding is effective to redress the injustices caused by the previous apartheid system to schools in the rural areas. The period under focus was that during apartheid and after the new dispensation after 1994. The second set of questionnaires was directed to Principals of selected schools and the last set was given to educators that belonged to the SGB who dealt with funds. The schools that participated in the research were selected

on the of representivity so as to avoid bias and generalisation. The method of narratives was used to analyse the responses obtained. The method of analysis allows the researcher to read meanings into responses by the use of descriptions and not merely to present numerical data. It enables the researcher to interact with the data, leading to an interpretation, as in the present research.

5.2 SURVEY RESULTS

5.1.1 Narrative analysis by Questionnaire items

Survey A of questionnaires for the Monitor and the EDO. (see Appendix 1)

Table 1- Number of responses to the Questionnaire:

	Monitor of N&S.	EDO
Number of questions	22	22
Able to answer	22	22
Unable to answer	0	0
Responses obtained in %	100%	100%

The two officials were given the same set of questions to answer, and they answered them all satisfactory. They demonstrated that the system of Norms and Standards of Funding is a policy that determines how monies are transferred to schools to function effectively. This means that the allocations are meant to enable schools to undertake their daily operational activities on a sound footing financially. This system is biased to the poor, which means that it caters more and favourably for the poor schools, particularly in the in the

rural areas. They both agree that schools are ranked in quintiles from 1-5, from the poorest to the least poor. Quintiles are in turn determined by Census. The main objectives of the system include the one to address the imbalances of the past with regards to the funding of schools. The challenges facing this system are that the schools complain about placed in wrong quintiles and thereby receiving less resource targeting table allocation.

One of the strong points of this new system of funding is that the poorest schools are now receiving adequate funding according to their specific quintile contestation.



The system of funding is not in its original form, in that, there was a need to amend it in 2006, because a number of areas were not covered and the amount given to a school was improved. The allocations have made a major change in the school operations. There is improvement in the areas of maintenance and that the educational areas have improved drastically.

Although the system is taking the right direction towards putting right what was messed up by the apartheid system of funding, schools are not getting enough funds for their operations to be sustained right through the year. They point out that schools need to have more funding per learner as most school are unable to raise funds on their own.

From the above it can be deduced that the present system of funding is on the right track, but the actual funding allocation is no enough to redress and undo that past imbalances. There is an urgent need of more funds per learner so that the funds can last or sustain the school's operations throughout the year.

Survey B of questionnaires for Principals:

Table 2- Number of responses to questions.

	Principals
Number of questions	11
Answered questions	11
Unanswered questions	0
Responses obtained in %	100%

The Principals of selected schools were categorised into three levels, that is, those in secondary, primary and farm schools. The majority of Principals that took part in the research have a superficial understanding of the system of Norms and Standards of Funding. They lack an in-depth meaning and understanding of this system of funding. For example, all of them understand that it about the provision and allocation of funds to assist school financially, but they fail to understand the major objective of this system, which is to redress the imbalances, and injustices that black schools experienced, particularly rural schools, during the apartheid era.

These schools began to receive these allocations between 2000 and 2006, and belong to quintile 2. These are in Quintile 2 because of:

- Health deprivation,
- Employment deprivation,
- Education deprivation,
- Living environment deprivation,

- Income and material deprivation.

School Principals are all in agreement that the allocated sum of funds is not enough for the educational needs and activities of their respective school.

They all believe that the allocated sum just cannot cover all the aspects of their urgent needs. So there is a dire need to supplement the annual allocations by means of self- fundraising, because the Department does not provide additional allocations where the need arises.

Most schools raise additional funds in the form of:

- Concerts,
- Funny days,
- Valentine's Day,
- Competitions,
- Donations both in the form of finance and resources.
- Bazaars



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Some schools just cannot fundraise to supplement the funds that they are allocated by the Department of Education, because parents are very poor and cannot afford. These Principals cite reasons that include the fact that parents in such schools have low levels of education, and are unemployed, they are living in a health deprivation area and those that work earn very low income.

Although all the Principals that participated in the research were in agreement that the sums of funding are not enough to cater for the most part of the needs of the schools, they also believe that the present system of funding has done a major improvement in the way their schools operate. Major areas of

improvement that were cited were that schools are now able to purchase Learner-Teacher support materials and other education related resources. This serves to ensure that all the learners have the required material for proper teaching and learning to be conducted. Before the new dispensation all Teacher-Learner support materials were supplied to white schools only. Schools are also able to purchase non-educational consumables and there is money to maintain the school environment. Some Principals believe that the system has done much to improve the environment in which proper teaching and learning can take place. They really appreciate the effort applied by the Department to improve their lot. They also mention that their school performance and results have since improved. They mention the point that due to the poor state of condition in their schools the majority of their learners went to other schools which were well resourced, but now those learners have come back and their numbers are increasing.

Others are of the view that the status quo is still the same; there is just no improvement in their schools. They believe that in initiating this new system the Department of Education should have made sure that all the schools have the correct and the same standard of infrastructure, before this system could go on full throttle. They point out that in this system the allocation of funds is based on the number of learners and this procedure further puts the schools in the rural areas at a disadvantage, because some parents in the rural areas are relocating to the towns and cities, with their children, where there are better job opportunities and better living and schooling conditions.

Survey C - questionnaires for Teachers that deal with funds.

Table 3- Number of responses to questions.

	Teachers dealing with funds
Number of questions asked.	6
Answered questions.	6
Unanswered questions.	0
Responses obtained in %.	100%

The teachers who are dealing with funds at their respective schools seem not to fully understand what is meant by the system of Norms and Standards of Funding, though they all agree that it is about funding. The schools are categorised into two sections, Sections 20 and 21. Section 20 schools do not receive hard cash, but get a correspondence that notify them of how much has been allocated for each of them. They, then, have to prepare a paper budget which they have to send to the District Office for approval and every thing they purchase has to be reflected in their budget plan. The majority of schools that took part in the research received between R160, 000 and R260, 000, but one school was allocated extraordinarily between R368, 410 and R472, 815. The above allocations are for secondary and primary schools, they exclude farm schools. The Section 21 schools are sent a correspondence that notifies them how much each has been allocated and deposited in their respective banks.

Section 20 schools believe that main challenge that they face is the fact that they have to prepare a paper budget, and run around collecting quotations which the Procurement Section fails to approve them on time. By the time the quotations are approved the funds have been reversed, it is even worse when those quotations are disapprove and the process of quotations has to be started all over again. They feel that that waists valuable time as this is done by educator because rural schools do not have Clerks.

Section 21 schools also experience challenges which include the fact that the allocation and distribution of funds is done by the Department of Education, not by the schools who know their needs. Another challenge is that the first trench is electronically deposited very late in May each year. This makes it difficult for the schools to prepare the budgets and make purchases in time. All the schools believe that the sum of allocation is not enough to cater for the major needs of the schools. They acknowledge that their schools still carry the burden of the past apartheid system and, therefore, need more funds and resources to redress the past imbalances and establish some equity between rich and poor schools.

They all allude to the fact that the new system is contributing to some form of improvement, though on a limited scale. They believe that there is so much to be done with the limited funds available.

Two farms schools which were selected to take part in the research show a contrasting picture. The first farm school is well resourced with Computers, telephone, electricity, quality office furniture, an appealing environment just to mention a few. The face of this farm school even out done big well-known public schools. The staff-room is well furnished and cosy, with sofas, a floor-rug in winter and floor tiles in summer. The tiles looked sparkling, showing that they are taken good care of. There are kitchen utensils and microwave, refrigerator, an electric stove with an oven and an urn for warm water. Every classroom is well supplied with learner desks, spacious chalkboards, a cupboard in which to safely keep learners' books and other records, the floors are covered with floor tiles which are also taken good care of and there are also electricity plugs in every classroom.

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The fencing all around the school yard is of good quality, which shows that the Principal and his Staff go for quality and style. The lawn is well trimmed and carefully dressed, which shows that the whole school community has taken the school as their face and identity. The water supply is stored in three big 5000 litre Jojo tanks. The fact that this farm school appears to be having many necessary resources does not cloud the point that the funding that the school receives from the government is not enough. The difference is that the staff and the Principal utilise their allocations on quality resources and also electricity installation has made things a lot easier for them.

The other farm school was a sight of squalor not only from the outside but also in the inside. There is no electricity which made it difficult for them to buy computers, TV-sets and everything that operates on electricity. There is no office furniture worth mentioning as both the Principal and the teachers use the same chairs and table that the learners use, and that is very normal with them. This school is house in an old, shabby and dilapidating farm house, which was used owner of the farm. The rooms in the house are used as classrooms from Grade R to Grade 5 and extra rooms as store-rooms. The same rooms are used as a staffroom and Principal's Office. The only items they have on the checklist are:



- Toilet facilities, in the form of two pits with zinc structures,
- Water supply from two 500 litre tanks.
- The farm house has ceiling, doors, windows,
- Desks and chalkboards.
- Stationary for learners.
- A worn out chalkboard.

The rest of the items on the checklist are not available and this impacts very negatively on the teaching and learning. The kind of fencing that surrounds the house is the same old fence that was used by the initial owner of the house. A look around the house shows that there is absolutely no taking care of it, as it looked shabby and untidy. The walls need fresh painting and dressing, an all round renovation. Although the grass is short, it is clear that the lawn is cared for at all. The result is that many parents have taken their children and sent them to neighbouring schools, which are about 5 to 6 km

away. The funding that this farm school received between 2007 and 2008 respectively was R11 080 and R14 220, and their enrolment is 62 learners. The better resourced farm school was allocated R92 000 in 2008 and R60 000 in 2007.

This farm school only lacks the following items that are in the checklist:

- Fax machine,
- Telephone,
- Security alarm,
- Intercom.
- Laboratory, and
- Boxing kit.



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Both farm schools feel that the allocation is not enough because the needs are unlimited; therefore, more money is needed to achieve them. They criticise the Department's policy of allocating funds per learner, because those schools with low enrolment receive less, thus placing them at a disadvantage. They argue that school allocation should be determined by the needs of the schools and not the number of learners in that particular school.

On a positive note the majority of Principals, both those in sections 20 and 21, have harped the same melodious tune that the new system of providing funds has contributed to a high level of improvement in their schools. Through this system of funding schools are now able to purchase the materials and

resources that are salient in a conducive atmosphere of quality teaching and learning.

From the sample of fifteen schools the majority had most of the items in the checklist, such as:

- TV-set,
- Computers,
- Photocopier,
- Printer,
- Other educational resources.



Surprisingly most schools did not have a telephone, and as such were not connected on Internet and do not have a fax-machine. They argue that the bulk of the allocation goes to renovations of old and dilapidating school buildings which they inherited from the old system. Even their sports grounds are not up to scratch, and they lack proper sporting facilities. Many sports fields are not fenced at all; in fact they are just marked and situated outside the school premises in the veld. This means that they are not taken care of as in the town schools. Many schools have only the basic sporting kit, like balls, soccer and rugby shorts and jerseys, the whistles and First Aid Kit. They still lack high standard training equipments which is readily available in white schools.

Below is an example of how a paper budget was prepared for one of the schools in the research:

FINAL FUNDING NORMS PAPER BUDGETS 2008/2009

You have been placed in Quintile 3 of the Resource Target Model for 2008. Schools in Quintile 1 and 2 have been declared "No Fee" schools for 2008. Your placement in the table was determined by the used of poverty data at ward level, as calculated by Statistics South Africa. Various factors were included in the calculation of the Index of Deprivation of the community that surrounds your school.



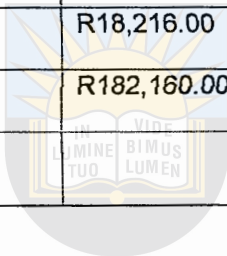
The domains that were used are:

- Income and material deprivation.
- Employment deprivation.
- Health deprivation.
- Education deprivation.
- Living environment deprivation.

It is important to note that the physical condition of your school was not considered for the calculation of the Index of Deprivation.

Your final paper budget for 2008 is:

ITEM	TOTAL	
LEARNING AND TEACHING SUPPORT MATERIAL	R 81,972.00	45% OF TOTAL
SCHOOL STATIONERY	R 21,859.20	12% OF TOTAL
CASH PAYMENT FOR QUINTILE 1 AND 2 SCHOOLS	R 18,216.00	10% OF TOTAL
EDUCATION CONSUMABLES	R 18,216.00	10% OF TOTAL
NON-EDUCATIONAL CONSUMABLES	R 9,108.00	5% OF TOTAL
MAINTENANCE	R 32,788.80	8% OF TOTAL
MUNICIPAL SERVICES	R18,216.00	10% OF TOTAL
GRAND TOTAL	R182,160.00	100%



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Please note the following:

- Only Quintile 1 and 2 schools qualify for a cash payment of 10%.
- The cash payment for Quintile 3-5 schools have been added to the maintenance section of the budget.

SUMMARY

The responses from different respondents have served to shed light to a living reality that the new system of funding has done much to improve the conditions in which the daily operations of rural schools must take place.

Through the provisions of financial allocations that this system has made, and continues to make available rural schools, a spade work has been started to clear the weed of long years of financial marginalisation. The majority of the schools in the research have indicated that, though there is still a dire need for more funds, they are able to operate with the available basic necessities.

In the following chapter the findings will be fully discussed and recommendations given, as well as conclusions around the areas that form the core parts of the research.

CHAPTER SIX

DISCUSSION, RECOMMENDATIONS AND CONCLUSION

6.1 INTRODUCTION

The primary aim of this research is to evaluate the impact of the new system of Norms and Standards of Funding in the daily operations of selected schools in the rural areas. In this chapter the discussion will be around the ability of this new system of funding to redress the past imbalances that black rural schools experienced under apartheid policies and to bring about equity between rural and urban schools. Recommendations will then be given as to what needs to be done better to ensure that the desired target points are obtained. Lastly, conclusions will be made around the important areas and milestone in the research.

6.2 DISCUSSION AND RECOMMENDATIONS

The Monitor on the system of Norms and Standards of Funding for public schools and the Circuit Manager, in the Eastern Cape Department of Education, both agree that the present allocation of funds provided to rural schools is just not enough to cater for all the needs of these schools. The same feeling is shared by both the schools Principals and the teachers dealing with school funds. The bulk of the allocation goes to the Teacher-Learner support material, which includes the stationery, textbooks, maps, charts, cleaning materials, auxiliary resources such as TV sets, DVDs,

Photocopiers, fax machines, payment of other services, maintenance of school property and so forth. This means that the money is not enough to engage in the facelifts of the school buildings because it is only meant for operational activities. In essence, infrastructural renovations consume a lot of money, hence the shortage and the need for a major increase in the allocation. Many school buildings still need repairing, with doors, windows, flooring and toilet facilities being highest on the list of required repairs. This, therefore, means that rural schools still carry or show a picture of backwardness and underdevelopment, because the previous government did nothing to improve their outlook.



On assuming the enormous task of applying the new system of funding in order to bring about transformation, the national Education Ministry acknowledged that the task of undoing the legacy of apartheid will be a prolonged process and a costly exercise. For the government to completely eradicate the imbalances of the past and bring about a leverage of equity, will require vast sums of money and time. This view is shared by Pillay (1992:101) who acknowledges that for the post-apartheid government to be able to reduce the inequalities in black education, enormous quantities of resources are going to be required. Pillay pointed out that the post-apartheid government will not be able to fund education for all at the level of expenditure for white education. It is, therefore, no wonder that the rural schools still house learners and teachers in dilapidating classrooms, with no proper windows, poorly fenced school grounds, and with no resources, sporting facilities are of very poor quality if not none existent.

The state pointed out that the burden of financing education should be done in active partnership with the parents of learners and other stakeholders, and those interested in the upliftment of education. This point is practically burdensome for rural parents whose majority depends on state pension and disability and child grants. The majority of rural parents survive on the poverty line to be able contribute financially to the education of their children. Many rural schools are unable to supplement what they receive from the government in a meaningful way.

The insufficient funding serves to underscore the enormous allocation of the state and render the improvements that the Principals cited as very elementary or minimal. Robinson and Sadan (1999:47) write that schools in poorer communities still have significantly fewer resources than schools in richer communities, despite equitable allocation from the provincial department. As a result, children from poorer communities continue to receive an inferior quality of education than children in wealthier communities. This all means that the government's objective of redress and equity is still but a wish and not a practical reality, as far as the schools in the rural areas are concerned. The majority of schools still lack the proper resources and the state of their classrooms leaves much to be desired. For the majority of schools the funds are unable to sustain the schools right through the financial year, funds just run short with still a lot of needs to be covered.

Gower (2008:8) cites Wildeman of Idasa who claims that the government's policy of providing funding has failed and needs to be scrapped. Reasons for

the failure range from inaccurate information that is collected and leads to inaccurate quintiling of schools.

The fact that the system of funding provides funds that fall short in their use, means that the affected schools must organise additional funds on their own efforts. These efforts can be as follows:

- Many schools supplement their allocations by undertaking fundraising activities such as renting out school chairs to their communities for weekend functions.
- These schools can also seek financial assistance from private donors and donations in the form of educational resources, such as computers, building of a block of classrooms and so forth.
- There can be an arranged cooperation between rich and poor schools. This called “twinning” and would range from the exchange of management skills to sharing and exchanging materials and resources, such as textbooks and other instructional materials, facilities etc.
- The state can also encourage big businesses to adopt schools in the rural areas and provide them with their basic needs to supplement their annual allocations. This can be done in the form of introducing incentives to those companies that have heeded the call. In reality big companies offer meaningful financial assistance to former Model C schools. If they can adopt rural schools there can be much improvement, which will be both operationally and infrastructural.

The above recommendations require that these schools should change their attitude and stop feeling ashamed of their challenges. They need to be creative and innovative, in that they need to come up with ideas on how to help themselves, because they are expected to perform irrespective of their present state of financial affairs. This means that they have to eke something out of nothing, just like those schools that perform superlatively under trees.



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6.3 CONCLUSION

The inferior position that the majority of schools in the rural areas still occupy was inherited from institutionalised apartheid policies. This position can be traced to as far back as since 1910, when, under successive governments, education for Africans was physically situated in the reserves under the caretaking of missionaries. The responsibility of financially providing for African education was systematically removed from the state, and handed over to the ever poor African communities. This shift of financial provision aggravated the already dire situation and conditions under which black education was conducted. Black rural schools were allowed to operate without electricity, clean running water, and proper infrastructure, which made it practically impossible for education to make a meaningful impact to the development of the rural population.

The introduction of the new system of funding was an ideal application of redressing past inequalities in educational provisions. The point that was missed, from the beginning, was to first map up ways of putting on the par those schools that were previously disadvantaged with those that were fully provided for and resourced, those schools that were institutionally advantaged by the apartheid policies. The previously marginalised schools needed to be elevated to the standard of those that benefited in the past. This same opinion was shared by one of the Principals. The fact that the government resolved to

target the poorest of the poor school manifested its commitment to redressing the past imbalances in funding.

The majority of Principals and their teachers stressed the point that the new system of funding has done much to improve the manner in which their schools operate on a daily basis than was the case before. Some go on to point out that, although more funds are still needed urgently, half a loaf is better than no bread at all. This means that for these Principals this system of funding is unable to elevate their schools to equal the so-called "Former Model C" schools, which every teacher and learner aspires to. The teachers, learners and parents all wish that the culture of teaching and learning can take place in a conducive environment, which is marked by quality infrastructure, high standard resources and a positive environment.

Looking at the sole purpose of the funding provisions, which is redress and equity, the following is worth noting:

- The funding provisions have worked thus far to the advantage of public schools which are supported by middle class and affluent parents. These are the same schools that had benefited from apartheid era with high quality facilities, equipment and resources, vigorous fund-raising by parents bodies, including commercial sponsors and fee income.
- Poor parents, especially, in former homelands areas have contributed their unequal share of their income over many decades, to the

building up, upkeep and improvement of schools through funds and other contributions, including physical labour. Many schools still suffer the problems of large classes, deplorable physical conditions, absence of resources and demoralised teachers and learners.

This serves to show that the gap between previously advantaged and those that were marginalised still remains too wide to bridge. Rural schools remain the most underdeveloped in the category of public schools. The fact that they manage with the available meagre funding does not lessen their plight. The figures of the funds they receive may look much, but in reality they are less, and the fact that there are no sponsors to supplement them make the challenges unbearable.



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QUESTIONNAIRES

QUESTIONS FOR THE MONITOR OF NORMS AND STANDARDS FOR FUNDING

SET 1

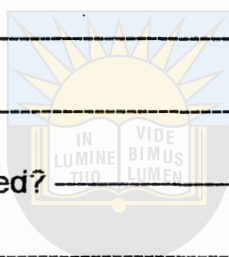
a. What is meant by Norms and Standards of Funding?

b. When was this system introduced?

c. How does this system operate?

d. What are the main objectives of this system?

d. What kinds of challenges does this system face?

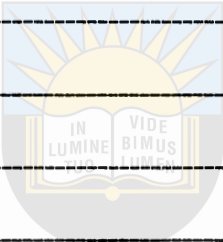


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e. What are its strong points or successes?-----

f. Is the system still in its original form, or has it been altered, amended, or modified?-----

g. If it has been altered, amended, or modified. What were the reasons?-----



h. What aspects do you look at in monitoring the system?-----

i. Have the schools' daily operations been improved since the inception of this system?-----

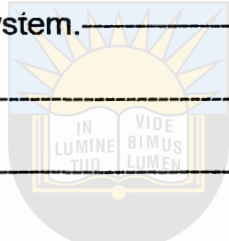
j. Can you please identify areas of improvement?-----

SET 2: QUESTIONS ON QUINTILES

a. What is meant by "Quintile"? _____

b. Why was the system of Quintiles introduced? _____

c. What are the objectives of the system. _____



d. What informs the process of categorising schools into quintile levels? _____

e. What challenges face the implementation of this system? _____

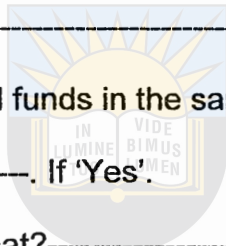
SET 3: PROCEDURE FOR ALLOCATION OF FUNDS

a. What informs the process and procedure of the allocation of funds?-----

b. When do schools get their funds available each year? -----

c. Is the allocated amount meant for general needs of the school, or for prescribed item? -----

d. Can a school apply for additional funds in the same year? -----



. If 'Yes'.

e. What are the requirements for that?-----

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f. Do schools receive enough funds for their operations to be sustained right through the year? Expatiate.-----

QUESTIONNAIRE FOR SCHOOL PRINCIPALS

a. What do you understand about the system of Norms and Standards of funding?-----

b. When was this system applied in your school? -----

c. What are its objectives?-----



d. Which Quintile level is your school place in? -----

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e. Please supply reasons why your school is in that level.-----

f. Is the allocated sum of funds enough for the needs and activities of your school? -----

g. If No. How do you supplement it?-----

h. Does the new system of funding cater for general needs or for prescribed item? -----

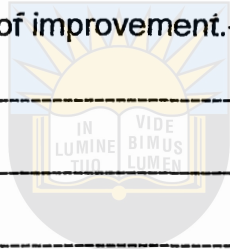
i. How does this system impact on the Teacher-Learner performance?

Expatiate. -----

j. What was the condition of your school before the new system of funding

was applied?-----

k. if bad. Please identify the areas of improvement.-----



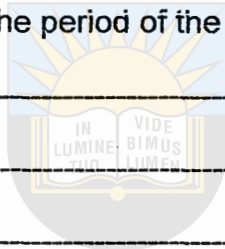
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QUESTIONNAIRE FOR TEACHERS DEALING WITH FUNDS

1. What do you understand about the Norms and Standards of Funding?-----

2. How much was the allocation for your school in 2007 and 2008? -----

3. What did you do with money in the period of the two years?-----



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4. Is the money allocated for school each year enough to cater for the school needs? Expatriate.-----

5. What problems does your school experience concerning the process of funding?-----

6. Is there development and improvement in your school ever since this new system of funding was applied? Substantiate. -----



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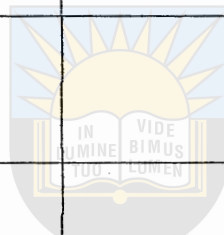
CHECHLIST FOR SCHOOL RESOURCES AND EQUIPMENTS

INDICATE TYPE OF SCHOOL	<u>SECONDARY</u>	<u>PRIMARY</u>	<u>FARM</u>
----------------------------	------------------	----------------	-------------

INDICATE WHETHER YOUR HAS EACH OF THE ITEMS IN THE TABLE:

ITEM	YES	NO	QUANTITY
RADIO			
TV SET			
COMPUTER			
PHOTOCOPIER			
PRINTER			
FAX MACHINE			
TELEPHONE			
SECURITY ALARM			
INTERCOM.			
ELECTRICITY			
LABORATORY			
LIBRARY			
LAWNMOWER			
CDS FOR EDUCATIONAL PROGRAMMES			
DVDS			

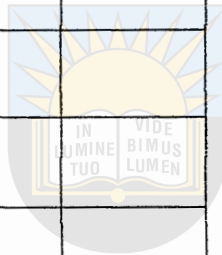
SPORT-FIELDS			
SPORTING EQUIPMENT			
ATHLETIC KIT			
RUGBY KIT			
SOCCER KIT			
NETBALL KIT			
BOXING KIT			
EDUCATIONAL OUTINGS			
INDICATE THE CONDITION OF ITEMS	GOOD	POOR	NON- EXISTENT
TOILET FACILITIES			
WATER SUPPLY			
CEILING			
DOORS			
WINDOWS			
DESKS			
CHALKBOARDS			
FENCING			
CONDITION OF CLASSROOMS			



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INDICATE WHETHER YOUR SCHOOL SUPPLY ENOUGH/LESS:

ITEMS	ENOUGH	LESS
TEXTBOOKS		
STATIONARY		
FILES FOR LEARNERS		
COMPUTERS		
PRINTING MACHINES		
SETBOOKS		
RESOURCE BOOKS		
SPORTS EQUIPMENT		
ADD ANY OTHER		



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Province of the
EASTERN CAPE
DEPARTMENT OF EDUCATION
OFFICE OF THE IDMSG,
KING WILLIAM'S TOWN EDUCATION DISTRICT OFFICE

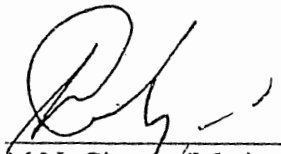
14 LOWERMOUNT STREET, KING WILLIAM'S TOWN REPUBLIC OF SOUTH AFRICA
Enq: Mrs MN Gitywa Tel : 043 6052041 Fax : 043 6424718 DATE: 13/11/2008

MR MYATAZA
MASIMANYANE SENIOR SECONDARY SCHOOL
NDAKANA

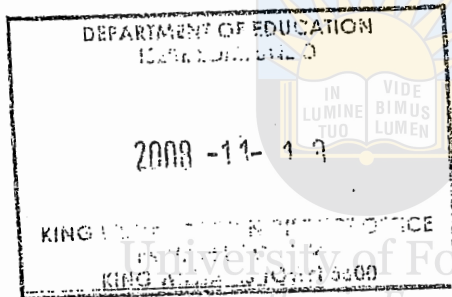
AN APPROVAL FOR CONDUCTING A RESEARCH

I wish to confirm that your request for conducting a research in the schools in our circuit has been granted and my office will be very glad to get the results of this study as they will assist me in improving school service delivery by our Department of Education.

Yours in service



M.N. Gitywa (Mrs)
(Circuit 12 Manager)



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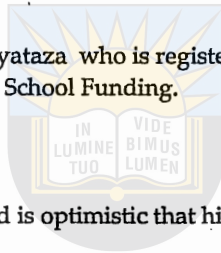
Province of the
EASTERN CAPE
DEPARTMENT OF EDUCATION
OFFICE OF THE CES IDMS & G,
KING WILLIAM'S TOWN EDUCATION DISTRICT

45 EALES STREET, KING WILLIAM'S TOWN REPUBLIC OF SOUTH AFRICA

Enquiries: Mr M.J.Makhanya Tel: 043 642 5882 Fax: 043 642 4718 17/12/08

To Whom It May Concern:

The KWT DISTRICT hereby allow Mr Zola Myataza who is registered at the University of Fort Hare to conduct Research on Norms and Standards for School Funding.



The District wishes him well in his Research and is optimistic that his Research findings will contribute positively to the Department of Education.

University of Fort Hare
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Thanking you in anticipation.

Yours truly

 NSF Co-ordinator

P.O. BOX 4634

KING WILLIAM'S TOWN

5600

11/11/ 2008

DEAR SIR / MADAM

RE: REQUEST TO CONDUCT RESEARCH AT YOUR SCHOOL

I HEREBY MAKE A REQUEST TO CONDUCT A RESEARCH AT YOUR SCHOOL. I AM A STUDENT AT THE UNIVERSITY OF FORT HARE AND AM CONDUCTING A RESEARCH TOWARDS COMPLETING MY DEGREE IN MPA. MY RESEARCH TOPIC IS "AN EVALUATION OF THE IMPACT OF THE NORMAND STANDARDS OF FUNDING ON OPERATIONAL ACTIVITIES OF SCHOOLS IN THE RURAL AREAS. AS PART OF THE RESEARCH QUESTIONNAIRES WILL BE DISTRIBUTED AND INTERVIEWS WILL BE CONDUCTED.

I THANK YOU FOR YOUR SUPPORT.

YOURS RESPECTFULLY

ZOLA MYATAZA



Province of the Eastern Cape
Department of Education

QUARTERLY FINANCIAL REPORT

NAME OF SCHOOL:..... EMIS:.....

DISTRICT:..... DATE:.....

Section 20

Section 21

This Financial Report must be completed and submitted to the District Office every quarter. The submission dates are: 15 April, 29 July and 14 October

This Report consists of two parts: PART A deals with the school allocation, which must be spent according to the categories defined in the Amended Norms and Standards policy (Paragraphs 94 – 99). The Provincial Department will give a recommended breakdown (guidelines) on the expenditure of these funds. Please refer to these documents when drawing up the list of expenditures. For the purposes of this report, we have grouped possible expenditures according to the categories in the Amended Norms and Standards list (Paragraph 96, (i – vi). However, the items each school spends the school allocation will differ.

PART B deals with self-generated or any other income the school receives, and the school expenditures against such income.

Instructions for completing PART A: Accounting for the school allocation

Section 21 schools receive their provincial school allocations in the school bank account in two tranches, one at mid-year, and one at the end of the year. The funding for Non-section 21 schools is paid at the beginning of the year into the District account.

INCOME FROM THE SCHOOL ALLOCATION:

- **Annual allocation:** What is your whole annual school allocation for this financial year? (You should be informed of this amount by September 30 of the previous year)
- **Expected to date:** In this column, please indicate the school allocation you were expecting to date. If you are a Non-section 21 school, your funds should be allocated to the District as a lump sum and should be available for your use at the beginning of each year.

- **Received to date:** In this column, please indicate the allocation you have actually received to date. If you are a Non-section 21 school, the District should have received the correct allocation for your school.
- **Variance:** In this column, please indicate any variance between the funding you expected to date and the funding you have actually received to date.

EXPENDITURE AGAINST THE SCHOOL ALLOCATION:

- **Annual budget:** How much did you allocate to each item in your school's annual budget?
- **Expected expenditure to date:** How much of your budget for the item were you expecting to have spent to date?
- **Actual expenditure to date:** How much of the budget have you actually spent to date?
- **Variance:** What is the difference between what you expected to spend and what you actually spent on the item?
- **Total expenditure:** What was your total expenditure against the school allocations?

SCHOOL ALLOCATION INCOME LESS SCHOOL ALLOCATION EXPENDITURE:

Subtract the total expenditure from the school allocation income. This will indicate to you whether you are running at a **deficit** or a **surplus**. You will then be able to take appropriate action to control your expenditure.

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Instructions for completing PART B: Accounting for self-generated and other funding

If you receive any funding other than the school allocation, please complete Part B. Other funding includes income from school fees, voluntary contributions, fundraising efforts, etc.

The procedure for the completion of this section is the same as the procedure for filling in Part A, except that you may list several sources of income. You may use self-generated and other funding for the same line items as listed under the expenditure for the school allocations, but in addition such funds may be used for other expenses as well, provided this is for educational purposes.

PLEASE INCLUDE YOUR LATEST BANK STATEMENT WITH THIS REPORT

PART A: REPORT ON THE SCHOOL ALLOCATION

INCOME FROM THE SCHOOL ALLOCATION				EXPENDITURE AGAINST THE SCHOOL ALLOCATION				
Annual allocation	Expected to date	Received to date	Variance	ITEM	Annual Budget	Expected expenditure to Date	Actual expenditure to date	Variance
				(i a) LEARNING SUPPORT MATERIALS: NON CAPITAL (less than R5000 per item)				
				Text books				
				Library books				
				(i b) LEARNING SUPPORT MATERIALS: CAPITAL ITEMS (More than R5000 per item)				
				(ii a) NON-LSM EQUIPMENT : NON CAPITAL ITEMS (less than R5000 per item)				
				(ii b) NON-LSM EQUIPMENT : CAPITAL ITEMS (More than R5000 per item)				

PART B: REPORT ON SELF-GENERATED AND OTHER FUNDING

INCOME					EXPENDITURE				
	Annual Budget	Expected to date	Received to date	Variance	ITEM	Annual Budget	Expected expenditure to Date	Actual expenditure to date	Variance
SCHOOL FEES					(i a) LEARNING SUPPORT MATERIALS: NON CAPITAL (less than R5000 per item)				
					Text books				
DONATIONS					Library books				
FUNDRAISING									
OTHER (SPECIFY)					(i b) LEARNING SUPPORT MATERIALS: CAPITAL ITEMS (More than R5000 per item)				
					(ii a) NON-LSM EQUIPMENT : NON CAPITAL ITEMS (less than R5000 per item)				
					(ii b) NON-LSM EQUIPMENT : CAPITAL ITEMS (More than R5000 per item)				
					(iii) EDUCATIONAL CONSUMABLES				
					Learner stationery				
					(iv) NON-EDUCATIONAL CONSUMABLES (Office stationery, fuel, paper, cleaning materials etc)				

(v) SERVICES for repairs and maintenance (eg. Equipment repairs, light bulbs etc)				
(vi) OTHER SERVICES				
Electricity				
Water				
Rates and taxes				
Security services				
Learner transport				
Rentals				
Licences				
Membership fees				
Telephone calls				
Bank charges				
Audit fees				
Insurance				
PERSONNEL COSTS (detail)				
BUILDING COSTS (Detail)				
OTHER (DETAIL)				
TOTAL SELF-GENERATED INCOME		TOTAL EXPENDITURE		
		INCOME LESS EXPENDITURE		

We hereby certify that the above is a true reflection of the state of the school's finances at the end of the above-mention quarter

.....
SGB TREASURER -
NAME

.....
SIGNATURE

.....
DATE

.....
PRINCIPAL - NAME
Comments:

.....
SIGNATURE

.....
DATE

.....
CIRCUIT MANAGER - NAME

.....
SIGNATURE

.....
DATE



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