

## Equity, Equality and Fairness: Funding for Quality Education in South Africa

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**KEYWORDS** Constitution. South African Schools Act. Education. Funding. Norms and Standards for School Funding. Apartheid

**ABSTRACT** Before 1994, funding of the education system in South Africa was differentiated along races and ethnic lines. This situation was created as a result of the bigger apartheid ideology, which leaned more towards the philosophy of divide and rule. White Papers in education were promulgated by the parliament from 1995, which culminated in the promulgation of the National Education Policy Act 27 of 1996 and the South African Schools Act 76 of 1996 (Schools Act). This conceptual reflective paper focuses on South Africa's provision of equality and equitable funding of quality education in her effort to address and redress the ills of the past using the Norms and Standards for School Funding Policy as an instrument.

### INTRODUCTION

The noticeable feature of education system in South Africa was the differential pattern of education development for different groups along the lines of colour, race, class, and ethnicity. While Whites were receiving a very high level of education, compared to the best in the industrialized world, nevertheless, education for Blacks was characterized largely by an inequitable and inadequate allocation of resources, overcrowded classrooms, high dropout rates, and insufficient numbers of and teachers who were poorly qualified. Against the background of apartheid, the education system was divided into four main systems for four racial groups: Whites, Indian, Coloreds, and Blacks. For the White community, there was a system of free and compulsory education, and for the Black groups, that is, Africans, Indians, and Coloreds, education was neither free nor compulsory (Christie 1986; Enslin 1986; Tshivhase-Phendla and Mashau 2010).

Tshivhase-Phendla et al. (2010) assert that education for Blacks was generally considered to be of inferior and designed to confine them to lower class occupations. There were differences even within Indian and Colored education systems because they were more privileged to a degree higher than Black education. These divisions served to entrench separate development in all aspects of life in South Africa. Consequently, it could be safely predicted that separate education could never have resulted in equal development of all South Africans.

Administration and control of African education passed from provincial administration in Natal, Transvaal, Orange Free State and the Cape Province, and from mission churches, to separate Bantu Education Section in the Department of Native Affairs of the Central Government. The results of the Bantu Education Act of 1950 were profound and subsequently endorsed racial differences in education (Hartshorne as cited in Lewis and Lemmer 2004).

Despite fundamental reforms to South African education, large performance gaps still prevail between former black schools and former white schools (le Roux 2014). In this conceptual paper, the researchers discuss whether the Norms and Standards School Funding Policy is addressing the inequalities of the past in funding for quality education.

### FUNDING OF BASIC EDUCATION: A HISTORICAL BACKGROUND

#### State of Affairs Prior 1994

In the foregoing paragraphs, the researchers have provided a brief insight into the historical divisions and fragmentations in the provision of education in South Africa. In addition, prior 1994, two education departments fell under the jurisdiction of the national parliament of the day, and four fell under the governments of the so-called self-governing territories. Four of these territories had four provincial components

and fell under the jurisdiction of racially composed administrations answerable through a variety of structures of their own elected assemblies called the Tri-Cameral parliament. This parliament comprised the House of Assembly (Whites), House of Representatives (Coloreds) and House of Delegates (Indians) (Davies 2005, 2013).

African education was further fragmented into seven departments of education in the self-governing territories or the so-called homelands, Kwa-Ndebele, Ka-Ngwane, Lebowa, Kangwane, Qwa-qwa, Kwa-Zulu, and Gazankulu, and four departments in the previously nominally states, which were Transkei, Bophuthatswana, Venda and Ciskei. Subsequently, educational control and administration in the pre-democratic era was a curious mixture of varying degrees of decentralization and centralization (Classen 1995).

Classen (1995) further states that in apartheid South Africa, those self-governing territories were located according to ethnicity and culture. The White race benefitted more than the Black race. Schools were also divided in terms of city, township and rural areas. For instance, children from city areas had very different experiences from children in the rural areas. Furthermore, there were also vast differences between rural and farm schools, further immense disparities existed between townships and squatter camps.

At the time, the duplicating education bureaucracy was mainly a result of the 1983 Tri-Cameral Constitution, which made provisions for both 'general affairs' and 'own affairs'. These 'affairs' were defined as those matters which were specifically or differentially affecting a population group in relation to the maintenance of its identity, the upholding and furtherance of its way of life, culture, traditions and customs in state administration (Booyse 2011).

According to Chisholm (2005), inequalities in differential spending were apparent. Inequalities had an impact on access to, and the quantity and quality of education on offer to Blacks and Whites. There were typical indicators such as literacy levels, school completion rates, learner-educator ratios, number, quality and qualifications of educators and availability of different types of resources. With all these indicators, the poorest off were Blacks who were living in the homelands, on farms, in townships and squat-

ter camps without basic facilities for education to take place.

### **State of Affairs Since 1994**

According to the Constitution of South Africa (Act 108 of 1996), as well as a White Paper on Education and Training (RSA, 1995) (a policy document that preceded the promulgation of the National Education Policy Act of 1996), education and training are basic human rights. The National Education Policy Act (Act 27 of 1996) states that the Minister of Education determines a national policy for education, which includes a policy for the provision of support services in areas such as health, welfare, career and vocational development, and counseling and guidance. The different provincial departments of education need to provide these services to learners and educators in order to ensure effective education and training as a fulfillment of the basic human rights requirement (Mashau et al. 2008).

According to Fiske and Ladd (2002), the cooperative government was central to the design of the new system. There was the view that each province should receive an equitable share of the national revenue for the purposes of providing the public services for which it was responsible. The national government has, since 1997, transferred an annual, single, unconditional grant to each province to be spent on education, health, welfare and other miscellaneous services. The equitable shares are based on a weighted average of demographically driven formulas, and they apply to each major functional area where the weights reflect the proportions of spending allocation grant to each expenditure category.

Fiske et al. (2002) further indicate that a suitable approach to equity would require the national government to provide every province with enough revenue for the province to meet the basic educational needs, both of its typical learners and the high cost to educate learners. Regardless, the amount distributed to each province is determined by the total funds, which are available at the national level, with the distribution among provinces determined by the number of learners' age and school population in each province. These kinds of funds-distribution mechanisms defeat the notion of equity and equality distribution of funds to schools in the country.

Regardless of these changes, there are major and esteemed changes in the state of South African schools, and there are also deep continuities with the past. To realize the vision of equal funding will take many years, as schools are still receiving inadequate funding even if there is a policy, which determines how schools should be funded. It is not surprising that the poorest provinces such as Eastern Cape, Limpopo, Kwazulu-Natal and Mpumalanga, with the poorest schools and largest unemployment ratios, are those that incorporate former homelands, which were as well divided in terms of ethnic groupings (Fiske et al. 2002). These provinces still receive little funding, compared to affluent provinces, which have additional funding raised by parents.

Probably, the realities of public schools in these former homeland-based provinces were founded on the divisive history of the past apartheid regime. Thus, shaking the past off would require unconditional commitment from policy-makers, politicians, intellectuals, academics and every citizen, given the history of more than two centuries which gave South Africa a unique identity of divide and rule oppressive hegemony (Fiske et al. 2002).

Fiske et al. (2002) perceive these dynamic dichotomies with awe in that, while discrimination in state resource allocation has been removed, inequalities persist for a number of reasons. First, by virtue of the locality of schools in different and poor provinces, access and provision is already defined and marginalized. Second, the ability or inability of parents to pay fees contributes to the greater availability of additional qualified educators in some schools, and this is a major factor contributing to unfavorable learner-education ratios to schools that cannot afford to employ additional educators (Chisholm 2005; Motala 2002). This is an emphasis that poor schools will remain poor, as there is no additional funding compared to rich schools where parents can afford to pay salaries of additional teachers

#### **ON THE ROAD TO EQUITY AND REDRESS**

In order to forge unity and equal opportunity to all South African citizens, regardless of race and ethnicity, the Constitution of the Republic of South Africa Act 108 of 1996, which is

the supreme law of the country together with several education legislations have been promulgated. The Constitution's preamble states, "*We, the people of South Africa believe that South Africa belongs to all who live in it, united in our diversity.*" Therefore, a single unifying education system was irrefutable to move the government towards equity. As a result, the Schools Act 84 of 1996 and the National Norms and Standard for School Funding were promulgated.

Since 1994, the government has made efforts to redress imbalances of the past. The government wants to achieve equity through fundamental policy mechanisms in order to restructure South African education. Equity reforms after 1994 in South Africa were intended to equalize funding and to provide quality education amongst all provinces, schools and different socio-economic groups. In order to achieve equity, national policies that directed state funding to public schools were formulated (Mestry and Ndhlovu 2014).

#### **South African Schools Act 84 of 1996 (SASA)**

South African Schools Act came into being in 1996. The Act aims to provide a uniform system for the organization, governance and funding of schools in the country, amend and repeal certain laws relating to schools, and provide for matters connected therewith. It also entails the way in which parents should help schools in terms of bringing their children to school and funding their children's education. It also guides on how the state should fund schools.

The Preamble to the Schools Act states, "*this country requires a new national system for schools, which will redress past injustices in educational provision, provide an education of progressively high quality for all learners and in so doing, lay a strong foundation for the development of all our people's talents and capabilities.*"

According to Fiske et al. (2002), the South African Schools Act is the main legislation related to schools. The Act along with the Constitution of the Republic of South Africa of 1996, Section 29 (1) (a-b), states, "everyone has the right to a basic education, including adult basic education, and to further education, which the state, through reasonable measures, must make progressively available and accessible". The Schools Act provides for a national system of

schools, which includes both public and independent schools. This Act promotes compulsory education for learners from ages seven to fifteen, or from Grade R through Grade 9 and it prohibits schools from discriminating against learners based on race or their inability to pay school fees.

The provision of basic education happens in schools where the Schools Act calls for all schools to be governed by elected governing bodies comprising all the school's stakeholders, including parents who comprise the majority, teachers, learners in secondary schools and non-teaching staff members. Each governing body is mandated to make recommendations regarding the appointment of all educators, including the principal, and is to take all reasonable measures within its means to raise additional resources, which were provided by the state (Fiske et al. 2002).

In addition, the National Education Policy Act of 1996 calls on the Minister of Education, in consultation with the Minister of Treasury, to set norms and minimum standards for the funding of public schools. The Norms and Standards Policy was set up to redress past inequalities. The National Norms and Standards for the School Funding Policy is regarded as a significant implementation strategic tool to redress the inequalities of the past and assist with the provision of quality education for all South Africans.

### **National Norms and Standards for School Funding**

The National Norms and Standards for School Funding set out the national norms and minimum standards for school funding, in terms of the Schools Act. It also determines resource allocation to schools. Amongst others, the norms and minimum standards deal with the public funding of public schools.

The National Norms and Standards for School Funding were gazetted in October 1998 and became a national policy on 1 April 1999 while its implementation started in 2000 (Nicolaou 2001; Karlsson et al. 2002).

The National Norms and Standards established funding procedures, which promote equity and redress within a context of inadequate government spending and increasing parental financial support for education and exempts parents who are unable to pay school fees.

The policy sets out the minimum standards associated with the public funding of public schools. Its purpose is to effect redress and equity in school funding, with a view of progressively improving the quality of school education within a framework of greater efficiency in organizing and providing education services. The norms and standards also indicate the method of distribution of funds according to certain categories. It has categorized schools into five groups, which are known as quintiles. The funding norms recognize that the Schools Act imposes a responsibility on all public school governing bodies to do their utmost to improve the quality of education in their schools by raising additional resources to supplement those, which the state provides (Patel 2002). However, this depends on where schools are situated, as some schools are found in deep rural areas where parents are unemployed and cannot raise additional funding.

The National Norms and Standards for School Funding require education departments in provinces to prioritize the neediest schools when making decisions about capital expenditure and to provide higher levels of recurrent non-personnel, non-capital funding for schools in poorer communities. Moreover, National Norms and Standards for School Funding provide for governing bodies to exempt parents of poorer learners to pay school fees. The policy does, however, neither address educator salaries nor the provincial education department's school level expenditure (Pampallis 2002; Karlsson et al. 2002).

According to Karlsson et al. (2002), to bring about redress among existing schools, provincial education departments are required to direct sixty percent of the non-personnel and non-capital expenditure towards four percent of the poorest schools in their provinces. In order to implement this strategy, provinces are required to compile a list of schools based on their socio-economic levels of development and physical resources, which is known as 'Target Resource List'. The 'resource targeting list' is used to divide schools into five categories known as quintiles, based on needs. Schools, which fall under quintile 1-3, are regarded as poor schools, and schools under quintile 4-5 are regarded as least poor schools.

In explaining Table 1, first, the poorest twenty percent of schools receive thirty-five

percent of resources, while the next poorest twenty percent receive twenty-five percent. Second, the next two categories receive twenty percent and fifteen percent, respectively. The last twenty percent of schools, which are largely former Model C and former House of Delegates schools, receive five percent of resources. The above recurrent cost allocation is used to fund water and electricity bills, maintenance of buildings and the purchase of learning materials, which is equivalent to at least R100 per learner. The policy states that if provinces do not have enough sufficient funds, priority is given to the poorest schools. It also deals with the procedures to be adopted by provincial education departments in determining resource allocation to their schools.

### DISCUSSION

Notwithstanding the National Norms and Standards for School Funding Policy, White schools still carry the token of 'quality' due to their exclusive physical infrastructure, buildings and security. These schools enjoy continuous teaching, while Black schools continue to exist in unsafe environments, schools without fences and where drug dealers have free reign.

To have access to those schools of high quality means Black parents have to part with

large sums of money because these former Model C schools are found in exclusively white urban areas. This demands that Black students need special forms of transport to travel from their township residences to these urban schools. With small wages or salaries, Black parents have to make ends meet and, therefore, have to dig deep into their already semi-empty pockets.

Many of the poorest schools in South Africa were based in the former homelands or what was referred to as self-governing states. Black learners from poor provinces such as Limpopo, Eastern Cape, Mpumalanga and Kwa-Zulu-Natal still walk more than 20 km to the centre of learning. This is very unfortunate for Blacks who have already suffered for long periods in the past, yet improved living conditions for them are nowhere in sight. South Africa has not yet reached a point of addressing the inequity, unfairness and inequality of the past due to backlog, which was found since the inception of democracy in 1994. Though policy to redress the inequality of the past is there, it is a little difficult to realize the dream due to the huge demand for education and minimal resources.

Although the current form of funding has created platforms to redress the past inequalities, former Model C schools are still well-resourced since they inherited their resources from

**Table 1: Resource targeting table based on condition of schools and poverty of communities**

<i>School quintiles from poorest to least poor</i>	<i>Expenditure allocation (percentage of resources)</i>	<i>Cumulative percentage of schools</i>	<i>Cumulative percentage of non-personnel and non-capital recurrent expenditure</i>	<i>Per learner expenditure indexed to an average of R100</i>
Poorest 20%	35	20	35	175
Next 20%	25	40	60	125
Next 20%	20	60	80	100
Next 20%	15	80	95	75
Least 20%	5	100	100	25

Source: Government Gazette No. 19347, October 1998

To simplify the above table:

<i>School quintiles</i>	<i>Expenditure allocation %</i>
Quintile 1 (poorest)	35
Quintile 2	25
Quintile 3	20
Quintile 4	15
Quintile 5 (least poor)	5

the former regime. While the state subsidized them with a percentage aligned to the schools' category, this seems not to dent their financial capacity.

In 2014, in a quest to redress past inequalities, parents whose children are in quintile 1-3 schools have been exempted from paying school fees. The Minister of Basic Education, Honorable A. Motshekga has updated the National Norms and Standards for School Funding Policy to accommodate these parents. These schools are known as no fee schools. According to National Norms and Standards for School Funding Policy, they form sixty percent of public school learners, nationally. The stipulated budget in Table 2 is per child in quintile 1-3 schools.

**Table 2: National table of targets for the school allocation (2015-2016)**

	2015	2016	2017
Quintile 1	R 1 116	R1 177	R1 242
Quintile 2	R 1 116	R1 177	R1 242
Quintile 3	R 1 116	R1 177	R1 242
Quintile 4	R559	R590	R622
Quintile 5	R1 116	R1 177	R1 242
No fee threshold	R1 116	R1 177	R1 242
Small schools:	R25 843	27 264	28 764
National fixed amount			

2016 and 2017 figures, inflation-adjusted CPI projected inflation rate adjusted National Norms and Standards for School Funding (2015)

Table 2 illustrates how schools should be funded following the review of the National Norms and Standards for School funding. The funding has been illustrated to cover 'no fee schools' from 2015 to 2016 taking into account the inflation rate.

### CONCLUSION

Even though the democratic government is trying to address the imbalances from the past by legislation relevant to address the needs of the poor, the problem that arises is that many children from formerly homeland states are still experiencing poverty that existed before 1994. The past historical inequalities and disparities are exceptional and notable. On the one hand, debates and discourses around funding of national education are particularly entangled in the

dynamic and dichotomous challenges between redress of the past discrimination to remove inequalities and the inefficient implementation of the National Norms and Standards for School Funding policy strategy. The most heated and debated issue around funding tends to overlap substantially across income levels as well as socio-economic formations.

### RECOMMENDATIONS

What is interesting with the National Norms and Standards for School Funding policy is that it also aims to address the construction of new infrastructures and maintenance of the current infrastructure. The planning for new schools' construction should include provision of water, electricity, sewage, telephone services on site, and connections to main services where these are provided to the school site. The construction of new schools or additional classrooms and learning facilities should be targeted towards the neediest population. Thorough implementation of the policy will improve quality of education in South Africa.

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