

**Exploring the Requirement and Conduct of  
Financial Training Programmes for Training of  
School Governing Bodies by the Department of  
Education in the North West Province**

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## DECLARATION

I, **Mogopodi Rethabile Setshogoe**, declare that this study titled **“Exploring the Requirement and Conduct of Financial Training Programmes for Training of School Governing Bodies by the Department of Education in the North West Province”** is my own work; carried out under the supervision of Prof Ravinder Rena. This mini-dissertation has not been submitted for any study or qualification at any institution of higher learning. All sources used in the study have been strictly indicated and acknowledged through references.

M. R Setshogoe

08/12/2020

**Signature**

**Date**

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**Mogopodi Rethabile Setshogoe**

## **ABSTRACT**

Majority of School Governing Bodies (SGBs) in South Africa are facing various challenges such as lack of appropriate governing skills, mismanagement of school funds and corruption. These challenges make it difficult for members of SGBs to discharge their duties. In terms of section 23 of the South African School Act (SASA), Members of the Executive Councils (MECs) for Education in each of the nine provinces in South Africa are required to formulate financial guidelines for the schools. These guidelines do not adequately address financial programmes for training of SGBs with regard to management of school funds. The purpose of this study was to explore the requirement and conduct of financial training programmes for training of School Governing Bodies by the Department of Education in the North West Province'

The study was underpinned by a positivist paradigm. A descriptive survey research design and a quantitative research approach was adopted. Data was collected from a sample of 50 SGB members in 20 selected schools in the North West Province. Respondents were drawn using a two-stage cluster sampling method with probability proportional to size. The collected data was analysed with the aid of a computer software package, Statistical Package for Social Sciences (SPSS).

The study revealed that SGB members' perceptions differ with regard to their role in managing school funds. The study revealed that the majority of SGB members do not have adequate financial management skills and knowledge to effectively manage school funds due to SGB members' literacy levels and limited financial management training. The study further reveals that SGBs in the North West Province of South Africa are facing a number of challenges such as financial mismanagement and corruption and they are incompetent to implement financial policies as prescribed by South African School Act (SASA) No, 84 of 1996. The study found that these challenges were as a result of lack of understating of SASA No, 84 of 1996 and inadequate financial training as well as monitoring and support by the North West DoE.

The study recommended that SGB member's financial management skills and knowledge should be enhanced through effective training and capacity development in financial management should be conducted in a language that would be understood by SGBs. The practical implication for this study is that the DoE should review the content of financial training programmes offered to SGBs and align the training to the functions of the SGBs. Recommendations for future research were also provided.

**Keywords:** inadequate, financial literacy, financial programmes, training, SGBs, financial management, school funds.

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## **LIST OF ABBREVIATIONS**

|                |                                                            |
|----------------|------------------------------------------------------------|
| <b>DoE</b>     | Department of Education                                    |
| <b>EMS-REC</b> | Economic and Management Sciences Research Ethics Committee |
| <b>HoD</b>     | Heads of Department                                        |
| <b>MECs</b>    | Members of the Executive Councils                          |
| <b>NWDESD</b>  | North West Department of Education and Sport Development   |
| <b>NWU</b>     | North West University                                      |
| <b>RSA</b>     | Republic of South Africa                                   |
| <b>SACE</b>    | South African Council for Educators                        |
| <b>SASA</b>    | South African Schools Act                                  |
| <b>SGBs</b>    | School Governing Bodies                                    |

## **CHAPTER 1**

### **INTRODUCTION AND BACKGROUND TO THE STUDY**

#### **1.1 INTRODUCTION**

Management of school funds is a sensitive and controversial issue as it exposes the strength and weaknesses of those in charge of managing school funds (Oboegbulem & Onuoha, 2013:66). Schools are the primary units of improvement and development in every economy in the world. Throughout the world today, there is mass swing in the direction of greater self-management and self-governance in institutions of learning (Bechuke & Nwosu, 2017:68). In the democratic South Africa, the emergence of self-managing schools has led to various changes in the management of finances in schools (Naidoo & Mestry, 2017:102). The purpose of this study was to explore the requirement and conduct of financial training programmes for training of School Governing Bodies by the Department of Education in the North West Province

Majority of SGBs in South Africa are facing various challenges such lack of appropriate governing skills, mismanagement of school funds and corruption (Hlongoane, 2016). These challenges make it difficult for members of SGBs to discharge their duties. In terms of section 23 of the South African School Act (SASA), Members of the Executive Councils (MECs) for Education in each of the nine provinces in South Africa are required to formulate financial guidelines for schools (Republic of South African [RSA], 1996). These guidelines do not adequately address financial programmes for training of SGBs with regard to management of school funds.

The ability of SGBs to effectively and efficiently govern and manage school funds is to a greater extent based on financial management experience and expertise. According to Basson and Mestry (2019), the allocation of financial control and management of school funds to SGBs has permitted public schools in South Africa to operate on their own, with little interference from external parties and less restrictions from the government. Operating independently will allow SGBs to take

advantage of different competences and influence among SGB members. However, majority of members of the SGBs in public schools, especially in the North West Province of South Africa lack the financial management skills due to inadequate financial training offered by the DoE. For these reasons, it is essential to provide the necessary training to empower SGB members to effectively manage school funds (Mestry, 2017).

This introductory chapter provides an overview of the study. The chapter begins by providing the background, rationale and problem statement for the study. Next, the chapter provides the research objectives and research questions that guided the entire study. A highlight of the literature review and the research design and methodology is included. The chapter then concludes by providing the definition of key terms used in this study, significance of the study as well as a highlight of the ethical consideration.

## **1.2 BACKGROUND TO THE STUDY**

The introduction of school governing bodies in South African schools has largely been motivated by a democratic discourse of communal participation, belonging and accountability (Davids, 2020:1). As prescribed by SASA No. 84 of 1996, SGB's are mandated to take charge of implementation of financial processes and management of the financial affairs of public schools (Naidoo & Mestry, 2017). In order to effectively and efficiently manage school funds, SGB members require specialised skills and knowledge, especially in the area of managing school funds to execute their mandated duties (Xaba, 2011:201). The DoE promotes the transformation of school organisation, governance and funding (Nqata, 2018). Nqata (2018) further highlights that finances are the pillars of every organisation; hence knowledge of financial management is a valuable skill that SGB members must acquire to effectively manage school funds. In this regard, SGBs should be well trained through effective training interventions.

In the South African public schools context, the SGB membership comprises of elected parents and/or guardians of learners, principals (by virtue of their position), educators, non-educators, learners (if the school is a secondary school) and co-

opted members (DoE, 2010; SASA, 1996). Institutional autonomy has been mandated to these members. According to Bechuke and Nwosu (2017), institutional autonomy involves allowing schools more autonomy in decision making about their management as well as delegating authority to the schools with a shared decision-making model engaging various stakeholders in a facilitative, rather than directive leadership.

School governance has been spotted as the single most important function in education seemingly experiencing a lot of challenges (Xaba, 2011). Majority of these challenges relate to the SGBs' inability to execute functions prescribed by the SASA 84 of 1996. SGBs have the power and authority to control school finances (RSA, 1996), it is essential that proper control of finances is put in place. Hence, SGB members in the North West Province must acquire the essential knowledge and skills to effectively and efficiently manage school funds. SGBs in the North West Province are currently experiencing challenges due to inadequate financial programmes available to train the SGBs responsible for managing school funds.

Statutory school level structures existed prior to 1994. The structures consisted of parents and only had limited decision-making powers; these were known as school committees, school boards or management councils (Tsotetsi *et al.*, 2008). The post 1994 South African Schools Act (RSA, 1996), the Education Laws Amendment Act (The Presidency, Republic of South Africa, 2007) and the Basic Education Laws Amendment Act (The Presidency, Republic of South Africa, 2011) clearly stipulate the financial functions and responsibilities of principals and SGBs (Basson & Mestry, 2019). Studies have established that despite considerable state funding, many public schools are not functioning optimally (Spaull, 2013; Taylor et al., 2011).

Furthermore, decentralisation of financial duties has posed numerous challenges of effective management of school funds by SGBs. The aim of decentralisation and self-managing schools is to move away from centralised power and control, thus compelling SGBs to structure management of finances in an honest and transparent manner, displaying a high sense of responsibility and accountability for their actions (Naidoo & Mestry, 2017). The DoE has an obligation to provide ongoing

management training to SGB members to empower and capacitate them to manage the allocated functions more effectively and efficiently (Basson & Mestry, 2019).

### **1.3 RATIONALE FOR THE STUDY**

Education is one of the most significant factors contributing to the development of a nation (Amirize & Ololube, 2018:546). However, in most developing nations, the education system is being affected by various factors such as radical socio-political and economic changes (Mestry, 2017). In South Africa, those in charge of school governance, SGBs, are facing numerous challenges in performing their roles as school governors (Hlongoane, 2016:120). Research relating to school governance in South Africa has focussed mostly on challenges facing SGBs in executing their financial management functions. However, limited research has been conducted on financial programmes used for training the SGBs in South Africa, especially in the North West Province. Davids (2020:1) concur that very little, if any, attention has been afforded to the role of school governing bodies in relation to requirement and conduct of financial training programmes for training of School Governing Bodies by the Department of Education.

The researcher's awareness of this research gap prompted the empirical exploration into the inadequacy of financial programmes used for training the SGBs by the Department of Education in North West. The rationale for this study was to contribute to the existing body of knowledge with regard to the financial management training used to assist SGBs in performing their roles and responsibilities as well as managing school funds effectively.

### **1.4 PROBLEM STATEMENT**

SGBs' role of financial management is regarded as one of the most challenging tasks because it is a task most SGB members have little or no training and expertise in (Dibete & Potokri, 2018). Dibete and Potokri (2018) further argue that although the SASA ranks SGBs' role of financial management as the most vital function, in most cases SGB members do not have the necessary skills and knowledge for the task. Research has shown that most public schools in South Africa, especially those in the

historically disadvantage areas, experiences a lot of challenges in managing and controlling school funds (Clarke, 2009:278; Department of Education, 2004:104; Dibete & Potokri, 2018:800; Selesho & Mxuma, 2012:493). Mavuso and Duku (2014:455) argue that most SGB members, for example the parent constituent tend to depend mostly on principals and educators for issues of governance, in particular management of school funds. This is because SGB members, mainly parents, do not have the required financial management skills and knowledge. Dibete and Potokri (2018) agree that the lack of financial management skills among SGB members is as a result of low literacy levels and inadequate financial management training.

The South African School Act of 1996 mandated SGBs to manage school funds. Majority of the SGB members especially in the North West Province of South Africa have inadequate knowledge of the school act and interpret it incorrectly, which has resulted in many schools experiencing financial mismanagement. In this regard, the South African Council for Educators (SACE) has indicated that some school governing bodies neither have the skills to appoint teachers, manage huge school budgets, nor the capacity to implement policies (Bechuke & Nwosu, 2017). Mestry (2017) believes that the challenges with financial mismanagement at schools are partly due to the fact that SGB members are inadequately prepared for their leadership position, or simply lack the necessary financial skills, knowledge and attitudes to lead and manage school funds effectively and efficiently.

The achievement of educational goals of any nation depends largely on adequate financial support. The funding and prudent management of scarce resources in secondary schools are crucial issues which should be handled with all amount of seriousness (Oboegbulem, & Onuoha, 2013). Dyantyi (2014) is of the opinion that SGB members in most public schools are unable to perform their duties and responsibilities properly due to factors such as inadequate financial training, low level of education, language used in the training, lack of mentoring and monitoring as well as inappropriate training methods. Majority of SGB members in the North West Province are not educated and do not attend training workshops organised by the DoE (Xaba, 2011:205).

## **1.5 PRIMARY RESEARCH OBJECTIVES**

The primary objective of this study was to explore the requirement and conduct of financial training programmes for training of School Governing Bodies by the Department of Education in the North West Province.

### **1.5.1 Secondary Research objectives**

In order to attain the main aim of the study, the following secondary objectives were formulated:

- To investigate the perceptions of SGB members about their role in managing school funds in the North West Province.
- To determine whether SGB members have the necessary skills and knowledge to effectively and efficiently manage school funds.
- To determine whether the Department of Education in the North West Province is providing adequate financial training to SGB members.

## **1.6 RESEARCH QUESTIONS**

Based on the background and problem statement as well as the objective the study, the following research questions were formulated:

- What are the perceptions of SGB members with regard to their role in managing school funds?
- Does SGB members have the necessary skills and knowledge to effectively and efficiently manage school funds?
- Does the Department of Education provide adequate financial training to SGB members?

## **1.7 PRELIMINARY LITERATURE REVIEW**

Before 1994, public schools in South Africa were governed by various school committees, school boards and school councils (Hlongoane, 2016:121). SASA made

a provision whereby certain functions were allocated to SGBs. Some of these functions include;

- raising funds for the school (in cash or in kind);
- establishing a school fund and administering it in accordance with directions issued by the Head of Department of basic education;
- opening and maintaining a bank account of the school;
- establishing budget priorities and preparing a budget each year;
- keeping records of funds received and spent by the school and of its assets, liabilities and financial transactions;
- drawing up annual financial statements, not later than three months after the end of each financial year to indicate money received and expenditures incurred by the school during the financial year, as well as its assets and liabilities at the end of the financial year concerned;
- ensuring that the accounting records and financial statements are audited or examined; and submitted to the Head of the Department of Education within six months after the end of each financial year (RSA, 1996).

The current education system in South Africa is made up of public schools (which include ordinary and special schools) and independent schools (Hlongoane, 2016:120). Hlongoane (2016:120) further referred to special schools as schools that are established with the aim of accommodating learners with special needs such as learners with disabilities. The establishment of public schools in South Africa is guided by Section 3, while independent schools are established in terms of Section 5 of SASA No, 84 of 1996 (RSA, 1996). Section 3 of SASA states that “public schools may receive funds from the state” while Section 5 states that “independent schools may not receive funds from the state” (RSA, 1996). SASA No, 84 of 1996 (RSA, 1996) requires public schools to prepare and submit audited financial reports to the district office of the provincial DoE.

Section 24(1)(a) of the South African Schools Act 84 of 1996 in attempting to enforce cooperative governance in schools, promulgated that parents should be part of the education of their children. Bechuke and Nwosu (2017) contends that even though this reform may appear promising, it is a source of discomfort as most SGB

members are not well trained to uphold the new demand of change. Naidoo and Mestry (2017:96) also argue that although SGBs play a vital role in the reporting of financial matters to all school stakeholders, majority of the SGB members have not adequately participated in their functions because they have not received enough training from the DoE. In this regard, SGBs can only function effectively if they are equipped with the necessary skills, knowledge and experience in governance.

Ngobeni (2015) contends that most SGB members in South Africa lack the basic financial skills due to inadequate training or non-existent training from the DoE. Mabasa and Themane (2002:112) argue that majority of SGBs are not trained before they become members and consequently do not perform their duties effectively. An SGB member should have the capacity to govern the school in all aspects. In this regard, the North West DoE must provide basic training to these members, especially in the area of managing school funds. Bechuke and Nwosu (2017) contended that it is a source of discomfort, as most SGB members are not well trained, to uphold the new demand of changes in the South African basic education.

## **1.8 RESEARCH DESIGN AND METHODOLOGY**

A research methodology is a domain or a road map to conduct research within the context of a particular paradigm, while a research method consists of a set of specific procedures, tools and techniques to gather and analyse data (Wahyuni, 2010:72). A research design is viewed as the functional plan in which certain research methods and procedures are linked together to acquire a reliable and valid body of data for empirically grounded analyses, conclusions and theory formulation (Vosloo, 2014:301). In other words, the research design provides the researcher with a clear research framework; it guides the methods, decisions and sets the basis for interpretation. For the purpose of this study, an empirical research, consisting of a descriptive survey research design was used to gain insight into participants' perceptions with regard to the inadequate financial programmes used for training SGBs by the department of education in North West.

### **1.8.1 Research paradigm**

According to Wahyuni (2012), a research paradigm is a set of fundamental beliefs and assumptions that affect the way in which the world is perceived and how social science research should be conducted, including the choice of a particular research methodology. Neuman (2011) explains that research paradigm is generally described as a whole system of thinking. For the purpose of this study, a positive research paradigm was followed to enable the justification of the theoretical assumptions and fundamental beliefs underpinning exploring the requirement and conduct of financial training programmes for training of School Governing Bodies by the Department of Education in the North West Province. Positivism was regarded appropriate in this study in that it is the most widely accepted philosophical assumption with a long history that originated in the early modern era around the 1930s (Given, 2008:648).

### **1.8.2 Research approach**

Research methods can be classified into quantitative research, qualitative research or mixed research methods based on the application of the research study, its objectives in undertaking the research and how the information is sought. For the purpose of the current study, a quantitative research method was used to answer the research questions for this study. A quantitative research is a means for testing objective theories by examining the relationship among variables (Creswell, 2009:4). In other words, quantitative research typically explores specific and clearly defined questions that examine the relationship between two events, or occurrences, where the second event is a consequence of the first event.

### **1.8.3 Population**

A population is a group of potential participants to whom the researcher wants to generalise the result of the study (Salkind, 2014:185). Hennink et al., (2011) remark that the population of a study should focus on participants who have particular knowledge and experience that can contribute to a greater understanding of the phenomenon studied. A population refers to the group or items having some

common characteristics one wishes to understand (Blanch et al., 2006). The population for this study will consist of all 174 SGB members excluding learners in all the 29 secondary schools in the Ngaka Modiri Molema District situated in the Mahikeng area in the North West, a Province in South Africa. The targeted SGB members was made up of elected parents and/or guardians of learners, principals (by virtue of their position), educators, non-educators, Administration Assistances, Head of Departments in schools and co-opted members. Learners were excluded from the population as they were all minors and their responses may have been influenced by their close relatives.

#### **1.8.4 Sample technique and size**

It may not be possible for the researcher to study the entire population of interest in every quantitative survey research (Khalid et al., 2012:20). In this regard, a sampling frame was used to reduce the amount of data collected by considering only data from a sub-group rather than all possible elements. Daniel (2012:1) describes sampling as the procedure for drawing units of analysis or respondents from a population for inclusion in the study. For the purpose of this study, 20 public high schools and 50 participants were drawn by using a two-stage cluster sampling method with probability proportional to size. Cluster sampling is a probability sampling procedure in which elements of the population are randomly selected in naturally occurring clusters (Daniel, 2012:151). Furthermore, cluster sampling with a higher size will yield less sampling error and attempts to present the accurate picture of the aim of the study (Daniel, 2012:158).

#### **1.8.5 Data collection**

The main research instrument for this study is a closed ended structural questionnaire. A questionnaire is regarded as the most appropriate research instrument in that a large amount of quantitative data can be obtained from a larger sample population (Clough & Nutbrown, 2012:124). Bird (2009) maintains that questionnaires are well established tools within social science research for acquiring information on social characteristics. The basic objective of the questionnaire was to obtain, assessed, evaluate and quantify the variation of the SGB members'

(excluding learners) perceptions of the financial programmes used for training SGBs by the Department of Education in North West. Bhat (2013) argues that a closed-ended question limits respondents to a specified number of answers. The close ended items in the questionnaire were identified based on the literature review for this study. The questionnaire will comprise of three sections.

### **1.8.7 Data analysis**

In order to attain the objectives of the study, quantitative data was analysed using a computer software package, namely Statistical Package for Social Sciences (SPSS). Frequency and percentages tables were used to present the data. Descriptive statistics, t-test procedures, univariate and multivariate analyses of variance, chi-square test, regression analysis, factor analysis, structural equation modelling was used to interpret the data in a coherent manner (Bowen, 2005). Descriptive statistics were used to describe central variables by statistical measures such as mean, median, standard deviation and variance. Inferential statistics such as independent sample t-test and one-way analysis of variance (ANOVA) were used to test the relationship between two or more variables for this study.

## **1.9 DEFINITION OF KEY TERMS**

The following key terms were defined and situated within the context of the current study.

### **School governing body (SGB)**

“School governing body is a statutory body of people who are democratically elected by a community (some members of the SGB may be opted) to govern a school in that particular community” (RSA, 1996).

### **Training**

Training is any form of instruction or acquiring/learning a particular skill.

## **Public school**

Public school is defined as “ordinary public school or a public school for learners with special needs” (RSA, 1995:15).

## **Financial management**

Financial management in this instance, is defined as “a process and function associated with the management of school financial resources to achieve the financial objectives of the school” (Van Rooyen, 2012).

### **1.10 SIGNIFICANCE OF THE STUDY**

The study is significance for many educational stakeholders in South Africa who are making extensive investment in education to ensure that school funds was managed effectively to achieve educational objectives. The results for this study could also:

- empower SGBs to undertake their assigned responsibilities effectively;
- empower SGBs to undertake their assigned responsibilities efficiently; and
- provide some valuable insights into the challenges of school governance in South Africa.

### **1.11 LAYOUT OF THE STUDY.**

The study comprises of five chapters as follows:

#### **Chapter 1: Introduction and background to the study**

Chapter one of the study provides the background, rationale and problem statement for the study. The chapter also provides the research objectives and research questions that guided the entire study. The research methodology as well as ethical consideration was highlighted in this chapter. The chapter further provides highlights of the literature review as well as the research design and methodology. Definition of key terms used in this study, significance of the study as well as highlights of the ethical consideration were also provided in this chapter.

## **Chapter 2: Literature review**

Chapter two of the study reviewed relevant literature relating to the phenomenon under investigation which is inadequate financial programmes used for training SGBs by the Department of Education in the North West Province. The chapter begins with a discussion of relevant theories applicable to the current study. Next, literature relating to school governing bodies in the current democratic South Africa. Afterwards, the chapter continues with a critical review of relevant literature concerning management of school funds, skills and knowledge to effectively and efficiently manage as well as financial training to SGB members.

## **Chapter 3: Research methodology**

Chapter three of the study provided a detailed description of the research design and methodology adopted to answer the research questions. The chapter provided a discussion of the philosophical assumption that underpins the study as well as the research design and methods adopted; and the rationale for adopting a descriptive research design and quantitative research methods respectively. The chapter further provided a discussion of data collection and analysis techniques used for the study. The chapter concluded with a detailed explanation of issues of validity and reliability as well as ethical consideration.

## **Chapter 4: Data analysis**

This chapter analysed and interpreted the data collected from a sample of 50 SGB members in 20 selected schools in the North West Province. The chapter began by interpreting data relating to the demographic characteristics of respondents. Next was an interpretation of data pertaining to perceived challenges facing SGB members, as well as challenges relating to financial management training.

## **Chapter 5: Summary, conclusion and recommendation**

This chapter provided a summary of the main findings for the study. The chapter also made conclusions based on the main findings. From these conclusions, constructive

recommendations were provided. The chapter further provided the limitations for this study as well as recommendations for future study.

## **1.12 SUMMARY**

Chapter one of the study provided the background, rationale and problem statement for the study. The chapter also provided the research objectives and research questions that guided the entire study. The research methodology as well as ethical consideration was highlighted in this chapter. The chapter further provided a highlight of the literature review as well as the research design and methodology. Definitions of key terms used in this study, significance of the study as well as a highlight of the ethical consideration were also provided in this chapter. The next chapter will focus on the review of relevant literature relating to the theme under investigation.

## **CHAPTER 2**

### **LITERATURE REVIEW**

#### **2.1 INTRODUCTION**

The previous chapter provided the background and problem statement for the study. This chapter reviews relevant literature relating to inadequate financial programmes used for training SGBs by the DoE in the North West Province. The chapter begins with a discussion of relevant theories applicable for the current study. Next, literature relating to school governing bodies in the current democratic South Africa is reviewed. Afterwards, the chapter continues with a critical review of relevant literature concerning the management of school funds, skills and knowledge required to effectively and efficiently manage as well as financial training to SGB members.

#### **2.2 THEORETICAL FRAMEWORK**

A theory is a structure of fundamental concepts and principles around which knowledge in a field is organised. According to Griffin (1990:37), a theory is a conceptual device for organising knowledge and providing a framework for action. Weihrich and Koontz (1999) posit that a theory is a systematic grouping of interdependent concepts and principles that give a framework to or ties together a significant area of knowledge. In this regard, theories offer explanations of how and why people think, feel, and act as they do, identify important variables and link them to form tentative propositions that can be tested through research (Newstrom, 2007). Many theories have been proposed to understand the concept of school governance. This study will adopt the collegial model as the theoretical framework to underpin this study (Bush, 2011).

### **2.2.1 Collegial model**

Collegial models emphasise that power and decision-making should be shared among some or all members of the organisation (Basson & Mestry, 2019:3). Collegial models assume that organisations determine policy and make decisions through a process of discussion leading to consensus (Bush, 2011). Power is shared among some or all members of the organisation who are thought to have a mutual understanding about the objects of the institution (Mestry & Govindasamy, 2013). According to Coleman and Anderson (2000), the Collegial Model supports the principle of participatory, consultative and collaborative leadership as well as joint decision-making, thus encouraging collaboration among various role players.

Through a collegial relationship, power is shared among some or all members of the organisation who have a shared understanding of the goals of the institution. Bush (2011) is of the opinion that much is gained when teachers work together. This is true in the case of the collaborative relationship between the SGB and other members of the school management team to effectively manage school funds. Anderson and Lumby (2005) assert that the management of resources is an important dimension of collaborative decision making. This implies that SGBs must engage in collaborative decision-making to ensure that financial resources are managed effectively (Basson & Mestry, 2019:4).

In schools today, the implementation of such collegial models and the success of collaboration is influenced by various factors. Hargreaves (1994:244) identifies several principles of collaboration as follows:

- Eliminates duplication of tasks: Activities are coordinated and responsibilities shared by all role players resulting in increased efficiency.
- Authentic collaboration improves the quality of work and therefore, significantly improves the management of financial resources.
- Reduces work overload: Sharing and integrating the expertise of role-players reduces heavy workloads and pools the collective knowledge of principals, school management teams and SGBs; thus all members learn from one another and grow.

- Collaboration reduces uncertainty among the principal, school management team and SGB and it creates collective professional confidence. It enables principals to interact more confidently with the school management team (SMT) and SGB, thus enhancing political assertiveness. Collaboration also implies the ability of SMTs and SGBs to work together in a relationship based on trust, understanding, cooperation and shared goals (Mestry & Govindasamy, 2013). Collaboration enhances the relationship between the SGB and the SMT and helps to realise the goals by involving all stakeholders in the management of school finances.

In summary, for schools to successfully achieve their goals, all educational stakeholders need to collaborate with SGBs and be part of the financial decision-making process.

### **2.3 SCHOOL GOVERNANCE IN THE DEMOCRATIC SOUTH AFRICA**

The dawn of democracy in South Africa gave rise to the democratisation and reorganisation of the education system, which gave birth to the reconstruction and development programme in 1994 and SASA 84 of 1996 (RSA, 1996). All these were meant to redress educational inequalities of the past, and schools were restructured; new systems of school governance and management were put in place (Nqata, 2018:1). In this regard, SGBs were introduced to address the imbalances of the past. Tsotetsi et al., (2008) contend that the introduction of SGBs was generally based on the premise that the state should share its power with other stakeholders, particularly those closer to the school, on a partnership basis.

In 1996, with the promulgation of SASA No. 84 of 1996 (RSA, 1996), shape was given to the guiding principles for education in South Africa, namely, access, redress, equity and democratic governance. This Act provides for the decentralisation of power to school level through the establishment of SGBs with considerable powers (*Tsotetsi et al.*, 2008:386). The term of membership of the SGB is three years (except for learners in secondary schools, who serve a one-year period) and election occurs in the same year in all schools nationwide. Subject to sections 20 and 21 of SASA (RSA, 1996), the governing body of a public school

must develop the mission statement of the school, adopt a code of conduct for learners of the school and determine the admission and language policy of the school.

This study should contribute to the information database on financial matters of schools and could provide information about the value of financial statement regarding the discharge of financial accountability in schools.

A school is an organisation that has to manage financial resources in order to achieve its core function of quality teaching and learning (Bapela, 2012). Furthermore, Bapela (2012) argues that in order for the school to manage resources properly, policies need to be developed according to rules, regulations and acts of the government.

### **2.3.1 SGB members**

According to SASA No. 84 of 1996, membership of SGBs comprises elected members, the school principal and co-opted members (RSA, 1996). Elected members of the governing body comprise individuals from the following categories: parents of learners at the school, educators at the school, members of staff who are not educators, and learners in the eighth grade or higher in secondary schools. The parents or guardians of learners attending a particular public school may be elected by other parents/guardians at an election meeting to represent them in the SGB. The law stipulates that parent members should be one more than the other voting members in the SGB. Parents may be biological parents, guardians or any person who looks after the child and meets the financial obligations of the said child.

#### **2.3.1.1 Parents**

Regardless of school size, parents always hold a majority through 50% plus one-member representation. Parents serving on SGBs of many public schools have limited financial knowledge and skills as well as low levels of literacy (Basson & Mestry, 2019; Heystek, 2006). These parents always find it difficult to make sound financial decisions. Thus, many financial functions are progressively delegated to

principals, who in turn, use the distributive style of management to delegate some of the important financial functions to other members of school management teams (Basson & Mestry, 2019:2).

Poorly educated parents lack management expertise and may struggle to interpret the content of the SASA (Heystek, 2006:482). This impacts on their relationship with other members of the SGB, particularly the principal; and their understanding of tasks they are responsible for (Heystek, 2004:431). The need for capacity among school governors as indicated in this discussion is further borne out by the research (albeit using a comparatively small sample) conducted for the Review of School Governance in South African Public Schools (DoE, 2004).

### **2.3.1.2      *Principals***

Principals are regarded as executive heads of schools. They are responsible for controlling and coordinating all school activities ranging from learners' enrolment, planning of the school timetable, keeping of school records like the class registers, log book, updating staff with information from the Ministry of Education, making budgetary and fiscal plans, sourcing of funds to run the school and managing the funds made available to run the school with the aim of realising educational goals and objectives (Amirize & Ololube, 2018:547).

Principals, by virtue of their positions, play dual roles: they serve on the SGB and *ex-officio* act on behalf of provincial heads of education in managing the day-to-day operations of the school (Basson & Mestry, 2019:2). Oboegbulem and Onuoha (2013:66) remark that principals are the fundamental elements on which the resource of school organisation depends, hence where the principal is weak and ineffective in managing the resources of the school, success was very difficult to achieve. Oboegbulem and Onuoha (2013) further argue that although school principals have major roles to play in school administration, none of these roles are as sensitive as management of school funds. Amirize and Ololube (2018:549) contend that some of these principals obviously fail in their statutory functions such as the identification of sources of school finances, methods employed in the collection and how revenues are adequately and effectively managed.

### **2.3.2 Constitutional functions of SGB**

An SGB may suspend learners found guilty of misconduct from attending the school as a correctional measure for a period not exceeding one week. SGBs may also recommend the appointment of teaching (and other) staff at the school and deal with disciplinary hearings of educators. The SGB should also support the principal, educators and other staff in the performance of their professional functions. SGBs are also tasked with supplementing the resources supplied by the state to improve the quality of education provided by the school (Tsoetsi *et al.*, 2008).

The SGB may employ educators additional to those allocated and salaried by the Provincial Departments of Education as long as the school raises funds for these additional teachers. The SGB may also oversee the maintenance of school property and buildings. These are extensive and complicated tasks and it has been observed with concern that some functions of SGBs are contingent on the social conditions of schools as well as the capacity disparity of some SGBs (Karlsson, 2002:331). This appears to entrench existing social inequalities at schools. It can therefore be argued that unless all governance functions and responsibilities are equally accessible and practised in schools, the democratisation of schooling in South Africa is tenuous and nothing more than policy rhetoric (Karlsson, 2002:132).

The SGB is the accounting authority for the management of financial resources. Therefore, members of SGBs have to be knowledgeable about policies, rules and regulations governing the management of school finances (Nqata, 2018:32). The South African Schools Act, 84 of 1996 provides for the establishment of SGB entrusted with the management of school funds. The finance personnel and committees at school level are seemingly not well-established or trained, and thus tend to be dysfunctional. The researchers recommend that finance policies be amended, finance committees be trained, and continuous monitoring of finances be provided by circuit and district officials ( Nduo & Mbunyuza-Heer Menlah,2015:3).

According to the SASA (1996: 11 Section 19) the provincial legislature (the Provincial Department of Education) must establish a programme to provide introductory training for newly elected SGB members to enable them to perform their functions (Nduo & Mbunyuza-Heer Menlah, 2015:4)

According to DoE, the SGB should control and monitor school funds in an appropriate way. This should be implemented as follows:

- Firstly, it should monitor all expenditures incurred.
- Secondly, it should inspect all vouchers to ensure that they are in line with all prescripts or other departmental directives.
- Thirdly, satisfy themselves that expenditure is in accordance with the approved budget and PFMA regulations.
- Fourthly, keep financial records and statements of public schools.
- Fifthly, keep records of assets, liabilities, financial transactions and draw up annual financial statement and budget documentation.
- Lastly, present audited financial statements to parents meetings not later than the 30th of March of the following year.

Members of the SGB need to acquire financial skills and knowledge of financial legislation, so that they can adequately perform duties of managing school finances (Nqata, 2018:49). Research suggests that school finance personnel have little or inadequate knowledge of school financial management. It is evident that, except for the “microwaved” induction they received immediately after their appointment or assumption of duties, the training of SGB treasurers, finance and petty cash officers had been completely ignored (Nduo & Mbunyuza-Heer Menlah, 2015:3).

Clearly the SASA represents a sophisticated form of democratic school management and it can only be successful if school governors possess the required competences (Tsoetsi *et al.*, 2008:386). The ability of parent governors to govern schools depends on their skills, knowledge and experience of governance, including financial skills. Moreover, governors require training in participatory decision making. However, neither parents nor educators have had much experience of participatory decision making since in the past, principals were considered to be the only people

with the knowledge and authority to make decisions (Heystek & Paquette, 1999). These abilities required by governors are determined, among other things, by educational background, especially literacy level, of governors (Bush & Heystek, 2003:1; Heystek, 2006:478) and the skills deficit in this regard is most acutely observed in schools in disadvantaged and rural areas (Nelushi, 2006).

## **2.4 MANAGEMENT OF SCHOOL FUNDS**

Management is defined as “the judicious use of all available resources for the attainment of defined goals. Management of funds therefore deals with the provision, custody and disbursement of the financial resources needed for the running of public or government established institutions” (Oboegbulem, & Onuoha, 2013:66). Jones and George (2011) concur that management of school funds entails “planning, organising, leading and controlling” school funds in an effective and efficient manner. Munge and Ngugi (2016) is of the opinion that effective financial management of school funds is the key element for the day-to-day operations of every educational institution. Munge and Ngugi (2016) further point out that the ability of SGB members to manage school funds depends to a greater extent on their financial management knowledge, skills and experiences. This knowledge, skills and experiences can be obtained through financial management training offered by the DoE.

SASA gives the responsibility of financial management to the SGB. However, school governance in South Africa is the single most important factor in education that seems to experience apparently insurmountable challenges (Xaba 2011:201). The researchers aimed at identifying the challenges facing school governing bodies regarding the implementation of finance policies for the management of school funds, suggesting ways and means of addressing such challenges, and identifying roles of the circuit, district and provincial officials in the effective recording and monitoring of school finances (( Nduo & Mbunyuza-Heer, 2015:3).

Furthermore, the current state of most public schools in the North West Province is quite appalling. Some of the books in the library are obsolete, inadequate equipment in the laboratory in situations where you even find one, and buildings are overdue for renovation (Amirize & Ololube, 2018:549). All these challenges could be as a result

of poor financial mismanagement by SGBs of these schools due to the inadequate financial training programmes used by the DoE in North West. Amirize and Ololube (2018:549) on the other hand argue that the root of these problems stem from the inability of some school administrators to plan and execute school budgets in accordance with the objectives of the school.

#### **2.4.1 SGB members role in managing school funds**

Dibete & Potokri (2018:799) investigated the perceptions of SGBs about their role in managing school funds in no fee schools in South Africa and found that perceptions, experiences and understanding of SGBs members and managing school funds differ. Dibete & Potokri (2018:799) further found that SGB members do not have the required knowledge, skills and experiences to manage school funds effectively due to SGBs members' literacy level and limited financial management training. The research findings further revealed that most finance committees were dysfunctional as they did not meet on a monthly basis for the preparation of monthly financial statements. Section 17 of the Labour Relations Act stipulates that mismanagement of school funds is a dismissible offence as it is regarded as serious misconduct. Six circuit managers indicated that they did not know of any irregularities in financial management in schools, but they had heard rumours about some principals who were misusing the funds and violating the principles and procedures governing the use of school funds (Nduo & Mbunyuza-Heer Menlah, 2015:5).

Fund refers to a sum of money or other resources set aside for a specified purpose (Mifflin, 2016). Funds can be in any of the following forms; physical cash, credit facilities that is trade credits, bank credits, allowances or discount received, differed expenses such as differed taxes, rents, bills, undistributed profit in the form of retained earnings (Amirize and Ololube, 2018). Amirize and Ololube (2018) further explain that the success or failure of any educational institution depends hugely on the availability of funds and the effective usage and management of such funds by the school administrator.

According to Amirize and Ololube (2018:546), management of funds in schools has been such a touchy, sensitive and controversy filled issue because it brings to the fore the strengths, weaknesses and failures of the managers with which these funds are entrusted. Many scholars reveals that financial management is the key aspect that promotes smooth running of an institution (Bapela, 2012; Maluleka, 2008; Ngubane, 2009 & Rangongo, 2011). Rangongo (2011) further highlights finance as an important resource that schools have to manage responsibly to provide quality education. In view of the complex functions prescribed for SGBs in South African schools, sound training, especially in the area of financial management should be provided for proper discharge of the multiple duties bestowed upon them (Tsoetsi *et al.*, 2008:385). Xaba (2011:210) in a study conducted with SGBs in primary schools found that majority of SGB members face difficulties in understanding governance, mainly because governors perceive their roles differently, which detracts their main responsibility — promoting the best interests of the school.

Amirize and Ololube (2018) conducted a study on the role of fund management strategies, accountability, factors that hinder fund management strategies and factors that strengthen effective administration of secondary schools and found that there are significant relationships between principal's fund management strategies, accountability, factors that hinder, and factors that strengthens effective administration of secondary schools.

## **2.5 SKILLS AND KNOWLEDGE REQUIRED TO EFFECTIVELY AND EFFICIENTLY MANAGE SCHOOL FUNDS**

Section 19 of the South African School Act directs that the HoD must provide introductory training to the SGBs to enable them to perform their financial functions (Dyantyi, 2014:1). Bechuke and Nwosu (2017:69) are of the opinion that due to inadequate financial skills among SGB members, the pillar of authority in the management of school funds has shifted the responsibility for the management decisions of schools to principals. Hlongoane (2016:126) found that SGBs in South Africa are facing a number of challenges such as financial mismanagement and corruption; and they are incompetent to implement financial policies as prescribed by SASA. Hlongoane (2016:126) further found that these challenges are as a result of

inadequate financial management skills, lack of understating of SASA No, 84 of 1996, and inadequate financial training, monitoring and support by the DoE.

The majority of schools had no school financial policies. They were managing their funds guided by the Public Finance Management Act (PFMA), SASA and 2009 prescripts for the use of school funds. These documents provide only the guidelines, not the specifics for the particular circumstances of individual schools. According to the SASA, every school must have its own school financial policy based on the Public Finance Management Amendment and relevant prescripts established by the Department of Education. (Nduo & Mbunyuza-Heer Menlah, 2015:5).

The lack of capacity, financial management skills in particular, becomes the order of the day in most public schools. Induction and training offered to SGB finance personnel seems to be inadequate. The finance personnel also experience difficulties in policy development, formulation and implementation. The researchers agree with Tsoetsi *et al.* (2008: 835) when they argue that the actual enactment of roles of SGB governors is often less than ideal (Nduo & Mbunyuza-Heer Menlah, 2015:6).

Every country's education system is a powerful instrument for socio-economic progress without which neither an individual nor a country can achieve professional and economic growth (Ololube, Ololube & Aiya, 2016). As such, the funds that are made available to the education system are expected to be properly managed (Amirize & Ololube, 2018:546).

Effective and efficient management of school's resources is crucial in order to make the school a pleasant, safe and comfortable centre that will increase learner's attendance, motivation and willingness to participate adequately in both curricula and co-curricular activities (Osei-Owusu & Kwame, 2012). Mestry and Bisschoff (2009:3) define schools financial management as the management actions (regulatory tasks) connected with direct and indirect financial aspects of schools carried out by individuals or groups in positions of authority, with the main aim of achieving schools' goals, namely the provision of quality education. Studies have cited that lack of the necessary knowledge and skills for financial management results in, inability to work

out practical solutions to practical problems. Another challenge articulated by Xaba (2011:201) is that educators in SGBs feels that other SGB members lack confidence and are not sure of their duties.

However, institutional autonomy which involves allowing schools more autonomy in decision making about their management as well as delegating authority to the schools with a shared decision-making model engaging various stakeholders in a facilitative, rather than directive and leadership has a negative impact on managing school activities (Mestry & Bisschoff, 2009; Bechuke and Nwosu, 2017).

The vision of the DoE is to provide accessible education to all, rendering a sustainable and quality service, promoting lifelong learning opportunities and self-reliance while continually contributing towards a democratic society and economic growth. To achieve these objectives, an extensive consultation with all stakeholders must be put in place. One of these important stakeholders is the SGB.

## **2.6 FINANCIAL TRAINING TO SGB MEMBERS**

The SASA 84 of 1996 mandates the establishment of school governing bodies that allow stakeholders — such as the state, parents, educators and learners (in secondary schools) — to play an active role in taking decisions on behalf of the school. However, Tsotetsi et al. (2008:385) argue that this can only happen if participants in school governance are trained to decide on matters affecting their schools. However, for these members to perform their prescribe functions, the Provincial Department of Education must provide them with basic training. Arguably, SGBs are not performing their functions effectively because the DoE is not providing adequate training, especially in the area of managing school funds.

Training is referred to as a process used by an organisation to modify peoples' knowledge, skills and behaviours so as to attain the organisational goals (Erasmus et al., 2013:20). Nqata (2018) concurs that if SGB members are trained effectively on managing school funds, their knowledge, skills and behaviours towards management of school funds could improve. However, research has shown that majority of SGB members lack the necessary knowledge and financial skills to effectively and

efficiently manage schools' finances (Basson & Mestry, 2019). Basson and Mestry (2019) further contend that this has resulted in more financial responsibilities assigned to principals, who in turn solicit the assistance of other members of school management teams, which include HoDs and deputy principals, given that principals and SGBs grapple with the demands of managing financial resources effectively.

Therefore, training of school governing bodies remains a priority for the successful functioning of SGBs. It is therefore the state's responsibility, in partnership with other stakeholders, to develop capacity for governing bodies, which will ensure that SGBs perform their duties and responsibilities effectively and efficiently (Marishane, 1999:59). Adams and Waghid (2003) further argue that training for school governors must be seen in terms of both introductory training for newly elected governing body members (every three years) to enable them to perform their functions and continuous training for governing bodies to promote the effective performance of their functions or to enable them to assume additional functions.

## **2.7 SUMMARY**

Education constitutes a vital flow in the management of human, physical and financial resources of a nation, especially in developing countries. A review of literature reveals that although effective management of school funds is the key aspect that promotes smooth running of a school, majority of SGBs members do not have the appropriate financial skills to manage school funds. Lack of these skills is due to inadequate financial management programmes used to train SGBs by the Department of Education. The next chapter discussed in detail the research design and methodology used to acquire empirical answers for the research questions for this study.

## **CHAPTER 3**

### **RESEARCH DESIGN AND METHODOLOGY**

#### **3.1 INTRODUCTION**

The previous chapter reviewed relevant literature relating to inadequate financial programmes used for training SGBs by the DoE in the North West. This chapter provides a detailed description of the research design and methodology adopted to answer the research questions. The chapter commences with a discussion of the philosophical assumption that underpins the study followed by the research design and methods adopted, as well as the rationale for adopting a descriptive research design and quantitative research methods respectively. The chapter further provides a discussion of the data collection and analysis techniques used for the study. The chapter concluded with a detailed explanation of issues of validity and reliability as well as ethical consideration.

#### **3.2 PHILOSOPHICAL ASSUMPTION**

Research is referred to as a scientific process of searching for solution to the research questions, creating new knowledge and methodical collection, organisation and analysis of data with a final objective of generation information that is useful in decision making (Kabir, 2016:2). In other words, the aim of research is to shape individuals understanding of the world we are living in. In this regard, it was appropriate to define the research paradigm that underpins the current study. According to Wahyuni (2012:69), a research paradigm is a set of fundamental beliefs and assumptions that affect the ways in which the world is perceived and how social science research should be conducted, including the choice of a research methodology. According to Neuman (2011), research paradigm is generally described as a whole system of thinking. For the purpose of this study, a positivist paradigm was followed to enable the justification of the theoretical assumptions and fundamental beliefs underpinning exploring the requirement and conduct of financial training programmes for training of School Governing Bodies by the Department of Education in the North West Province'

### **3.2.1 Positivist paradigm**

A positivist paradigm seeks to discover the actual reality and present the truth by empirical means so as to uncover the casual relationship in order to predict and control events (Du Plooy-Cilliers, Davis, & Bezuidenhout, 2014). According to Vosloo (2014) positivism involves a belief that valid knowledge can only be produced on the basis of direct observation by the senses; this would include the ability to measure and record what would be seen as knowledge. Positivist research paradigm was considered appropriate for this study as it applies the lens of natural science to social science as well as supports the principles of descriptive survey design and a quantitative research approach (Wahyuni, 2010:71). Ryan, Scapens and Theobald (2002) put it yet another way in that positivist research is appropriate in that it gives reliable and empirically sustainable answers to questions that policy makers regard as important.

### **3.3 RESEARCH DESIGN**

A research design is viewed as the functional plan in which certain research methods and procedures are linked together to acquire a reliable and valid body of data for empirically grounded analyses, conclusions and theory formulation (Vosloo, 2014). Kabir (2016:19) refers to research design as the conceptual structure, logical systematic planning and blueprint to the whole procedure of planning and conducting an empirical research study. In other words, the research design provides the researcher with a clear research framework; it guides the methods, decisions and sets the basis for interpretation. For the purpose of this study, an empirical research, consisting of a descriptive survey research design was used to gain insight into participants' perceptions with regard to the inadequate financial programmes used for training SGBs by the Department of Education in North West.

Descriptive research design seeks to determine the reality of phenomenon as it actually uses words and numbers (Neuman, 2011:38). More specifically, the main aim of a descriptive research design is to signify the accurate profile of an individual, events or situation. Confirming this assentation of research design, Salkind (2014) indicates that the main advantage of descriptive research design is that it describes

the current state of affairs at the time of the study using survey research and a correlational study. A descriptive research design was considered appropriate for the current study because the aim of this study is to portray the accurate profile of inadequate financial programmes used for training SGBs by the Department of Education in North West Province.

A survey research is the systematic gathering of information from respondents for the purpose of understanding and/or predicting some aspects of the behaviour of the population of interest (Bhat, 2013:37). Ugwuowo (2016:6) puts it that a survey research uses questionnaire to collection data about practices and situations perceived at a particular point in time. Surveying involves gathering information from individuals using a questionnaire. Surveys can be descriptive or explanatory and involve the entire populations or a sample of the populations. Another advantage is that this approach offers a degree of confidentiality and privacy to the participant taking part in the research. Using a survey means that the researcher is able to reach a large number of respondents and generate quantifiable empirical data in the research process (Wilson & Abibulayeva, 2009:210). A Survey research was considered fitting for this study as it uses scientific sampling and questionnaire design to measure characteristics of the population with statistical precision (Bhat, 2013:37).

### **3.4 RESEARCH METHODOLOGY**

Research methodology is referred to as the path through which the researcher frames their research problem and objectives and presents the findings from the empirical data collected during the research process (Sileyew, 2019:1). A research methodology is usually taken to be a discipline, bordering on philosophy, whose function is to examine the methods used or should be used to produce valid knowledge (Gaffikin 2014). According to Clough and Nutbrown (2012), research methodology shows how research questions are articulated with questions asked in the field. Vosloo (2014) describes research methodology as reference to the researcher's general approach in carrying out the research project; focus on the research process and the kind of tools and procedures to be used. A quantitative research methodology was considered appropriate for this study as it enabled the

researcher to address a range of descriptive questions and to verify the applicable theory for this study by trying to make sense of how different social cognitive career theory factors may influence learners' career choice in accounting (Wilson & Abibulayeva, 2009:429).

### **3.5 RESEARCH APPROACH**

A research approach consists of a set of specific procedures, tools and techniques to gather and analyse data (Wahyuni, 2010:72). Research approaches can be classified into quantitative research, qualitative research or mixed research methods based on the application of the research study, its objectives in undertaking the research and how the information is sought.

#### **3.5.1 Mixed methods research**

Mixed methods research is referred to as the type of research whereby the researcher employs both the qualitative and quantitative techniques, methods and concepts in a single study (Vosloo, 2014:307). The goal of mixed methods research is not to replace either the quantitative or qualitative approaches to research, but rather to draw from the strengths of these approaches and to minimise possible weaknesses (Vosloo, 2014:320). Blending qualitative and quantitative methods of research can produce a final product which can highlight the significant contributions of both.

#### **3.5.2 Qualitative research approach**

Qualitative methods are best for addressing many of the why questions that researchers have in mind when they develop their projects, while quantitative approaches are appropriate for examining who has engaged in behaviour or what has happened (Given, 2008). Therefore, the selection process should be driven by the research question as it provides the characteristics of the cases to be studied. Wahyuni (2012:73) opines that qualitative research embodies using more than one data collection techniques and applying multiple methods to analyse data using non-numerical (qualitative) procedures to answer the research question.

### **3.5.3 Quantitative research approach**

A quantitative research is a means for testing objective theories by examining the relationship among variables (Creswell, 2009:4). Given (2008) posits that quantitative approach to inquiry deals with the process in which individuals relate and attach meanings to their socio-cultural and material environment. In other words, quantitative research typically explores specific and clearly defined questions that examine the relationship between two events, or occurrences, where the second event is a consequence of the first event.

For the purpose of the current study, a quantitative research method was used to answer the research questions. A quantitative research methodology was considered appropriate for this study as it enabled the researcher to address a range of descriptive questions and to verify the applicable theory for this study by trying to make sense of how different social cognitive career theory factors may influence learners' career choice in accounting (Wilson & Abibulayeva, 2009:429).

Although phenomena such as individuals perception is a qualitative concept and obviously do not exist naturally in quantitative form, the researcher developed and designed the research instrument aimed specifically at converting the non-numerical information into quantitative data, which could be analysed using statistical techniques (Bhat, 2013:37).

### **3.5.4 Population for the study**

A population is referred to as the entire set of relevant units of analysis that the researcher wants to collect data on or from for analysis (Bhat, 2013:37; Wiid & Diggines, 2013:186). A target population is a particular set of large groups of elements from which the research draws a sample and to which results from the sample are generalised (Neuman, 2011:252). Hennink et al., (2011) remark that the target population for a study should focus on respondents who have particular knowledge and experience that could contribute to a greater understanding of the phenomenon being studied. A population is a group of potential participants to whom the researcher wants to generalise the result of the study (Salkind, 2014:185). A

population refers to the group or items having some common characteristics one wishes to understand (Blanch *et al.*, 2006). The population for this study will consist of all SGB members in all the secondary schools in the Ngaka Modiri Molema District situated in the Mahikeng area in the North West Province. The targeted SGB members were made up of elected parents and/or guardians of learners, principals (by virtue of their position), educators, non-educators, Administration Assistances, Head of Departments in schools and co-opted members.

### **3.5.5 Sampling technique and sample frame**

Sampling is a process or technique of selecting a suitable sample for the purpose of determining parameters of characteristics for the whole unit of analysis (Adams *et al.*, 2014:72). A sample is described as a group of a fairly smaller number of participants selected from a population for investigation purpose (Alvi, 2016:11). It may not be possible for the researcher to study the entire population of interest in every quantitative survey research (Khalid *et al.*, 2012:20). In this regard, a sampling frame was used to reduce the amount of data to be collected by considering only data from a sub-group rather than all possible elements. Daniel (2012:1) describes sampling as the procedure for drawing units of analysis or respondents from a population for inclusion in the study. For the purpose of this study, 20 public high schools were drawn by using a two-stage cluster sampling method with probability proportional to size (De Smith, 2018:63). Cluster sampling is a probability sampling procedure in which elements of the population are randomly selected in naturally occurring clusters (Daniel, 2012:151). Furthermore, cluster sampling with a higher size will yield less sampling error and attempts to present the accurate picture of the aim of the study (Daniel, 2012:158). Cluster sampling was considered appropriate for this study because is a probability sampling procedure in which elements of the population are randomly selected in naturally occurring clusters (Daniel, 2012:151).

A total of 20 schools representing 67% of the total 29 secondary schools (refer Appendix F) in the Mafikeng area were sampled using a simple random sampling technique. A total of 50 respondents representing 28.74% of the total sampled population of 174 was sampled.

### **3.6 DATA COLLECTION**

The main research instrument for this study is a closed ended structural questionnaire. A questionnaire is regarded as the most appropriate research instrument in that a large amount of quantitative data can be obtained from a larger sample population (Clough & Nutbrown, 2012:124). Bird (2009:130) maintains that questionnaires are well established tools within social science research for acquiring information on participant social characteristics. Bhat (2013:42) argues that closed-ended question limits respondents to a specified number of answers. The close ended items in the questionnaire were identified based on the literature review.

The primary data on which the analyses was performed, originated from a paper-based survey instrument that was distributed to all SGB members in the selected schools. Prior to the data collection, permission was obtained from the relevant authorities before approaching the respective schools and SGB members. The researcher physically administered the survey questionnaire. The researcher briefly explained the purpose of the study to the participants and interested participants who volunteered to participate in the study were given a consent form to sign before participating. The survey took approximately 15 minutes to complete.

A questionnaire is regarded to as the most appropriate research instrument in that a large amount of quantitative data can be obtained from a larger sample population (Clough & Nutbrown, 2012:124). Five-point Likert-scale type questions were used to collect the data. The questions developed for inclusion in the study were based on the results of the literature reviewed. The questionnaire was used in this study given its appropriateness as a research instrument for collecting information on SGB members' attitudes and perception, level of knowledge, expectations and aspirations regarding financial programmes used for training SGBs by the Department of Education in North West. The questions included in the questionnaire were closed ended questions.

The questionnaire comprised of three sections as follows (refer Appendix A):

#### **Section 1: Demographic factors**

This section consisted of seven questions ranging from gender to number of years in the SGB. Responses for this section were used for statistical purpose only.

## **Section 2: Perceived challenges facing SGB members**

This section contained eight questions investigating participants' perceptions with regard to the challenges facing SGBs in their school. Participants were asked to rate their responses on a five-point Likert-type response ranging from 1 = strongly disagree to 5 = strongly agree.

## **Section 3: Financial training**

This section was made up of nine questions investigating participants' perceptions with regard to the level of training provided by the DoE to SGBs pertaining to management of finance. Participants were asked to rate their responses on a five-point Likert-type response ranging from 1 = strongly disagree to 5 = strongly agree.

### **3.7 DATA ANALYSIS**

In order to attain the objectives of the study, the quantitative data was analysed using a computer software package, namely Statistical Package for Social Sciences (SPSS). Frequency and percentages tables were used to present the data. Descriptive statistics, t-test procedures, univariate and multivariate analyses of variance, chi-square test, regression analysis, factor analysis and structural equation modelling were used to interpret the data in a coherent manner (Bowen, 2005:208). Descriptive statistics were used to describe central variables by statistical measures such as mean, median, standard deviation and variance. Inferential statistics such as independent sample t-test and one-way analysis of variance (ANOVA) were used to test the relationship between two or more variables for this study.

Frequency analysis was used to evaluate each of the questions and its variables to examine how many respondents responded to each question on the questionnaire. Correlation test was run to define the correlation between the variables of each section in the questionnaire. Non-parametric testing was run to test the statistically

significant differences between the demographics of the respondents with respect to each question in the questionnaire.

### **3.8 VALIDITY AND RELIABILITY**

A pilot for the questionnaires was conducted to validate the validity of the content of the tool in the sense of the respondents' understanding (Sileyew, 2019:7). Hence, content validity (in which the questions are answered to the target without excluding important points), internal validity (in which the questions raised answer the outcomes of researcher's target), and external validity (in which the result can generalise to all the population from the survey sample population) were reflected. Following the feedback process, minor changes were made to the originally designed data collecting tools. The pilot test made for the questionnaire test was on 10 sample sizes selected randomly from the target sectors and experts. The Cornbrash alpha coefficient was used to test reliability while the research supervisor was consulted to determine the content validity of the research questionnaire.

### **3.9 ETHICAL CONSIDERATION**

It is essential that throughout the research process the researcher follows and abides by the ethical guidelines. According to Salkind (2014:149), the researcher must keep the participants at the forefront of all consideration and maintain their dignity. Most ethical issues fall into one of the four categories namely; protection from harm, informed consent, the right to privacy and confidentiality as well as honesty with professional colleagues (Leedy & Ormrod, 2005:101; Punch, 2014:43).

An information sheet in English and the local language (Setswana), explaining the purpose and objectives of the research was developed. A consent form that includes statements that the participant has understood what they were involved in was signed by all the participants before participating on the study. Respondents were assured that if they decide at any time that they did not want to participate in this study, they could withdraw from it immediately. Confidentiality and anonymity was maintained and it would not be possible to identify any participant from any publication relating to this study.

The researcher sought permission to conduct research from the District office of the DoE in Mahikeng (Ngaka Modiri Molema) before approaching the selected schools. The research proposal and the questionnaire were also be submitted to the North West University Ethics Committee for approval. The researcher ensured that the data collection process would not interrupt normal school activities and confidentiality of all concerned was respected. The researcher also endeavoured to protect participants from the risk of harm or from a situation where information collected could be used to their detriment.

### **3.10 SUMMARY**

This chapter discussed the research design and methodology in detail and located the study with a positivist research paradigm and a quantitative research approach. Primary data was collected from 50 respondents representing 28.74% of the total sampled population of 174. The chapter also provided a detailed explanation of issues of validity and reliability as well as ethical consideration. The next chapter analyses and interprets the data collected from SGB members in the Mahikeng area in the North West Province of South Africa.

## **CHAPTER 4**

### **DATA ANALYSIS**

#### **4.1 INTRODUCTION**

The previous chapter provided a detailed description of the research design and methodology adopted to answer the research questions. This chapter will analyse and interpret the data collected from a sample of 50 SGBs members in 20 selected schools in the North West Province. The chapter begins by interpreting data relating to the demographic characteristics of respondents. Next, an interpretation of data pertaining to perceived challenges facing SGB members, as well as challenges relating to financial training is displayed.

#### **4.2 DEMOGRAPHIC FACTORS**

SGB is referred to as a statutory body of parents, educators and non-teaching staff

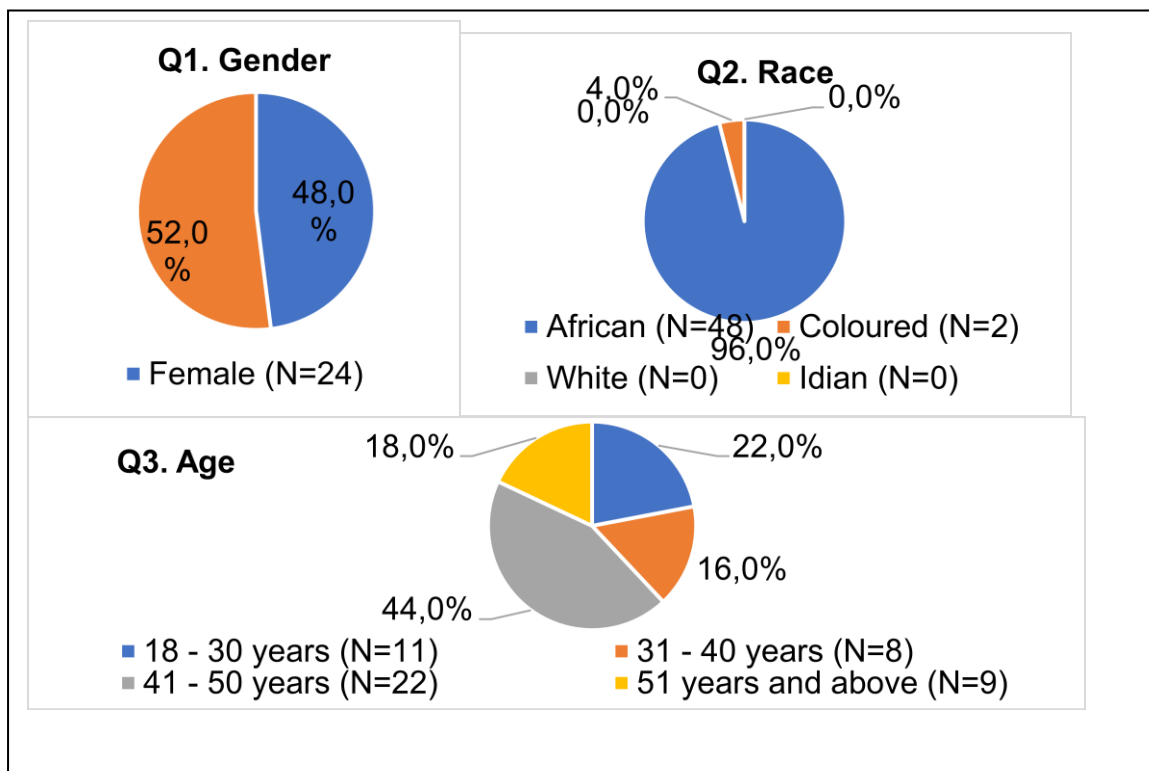
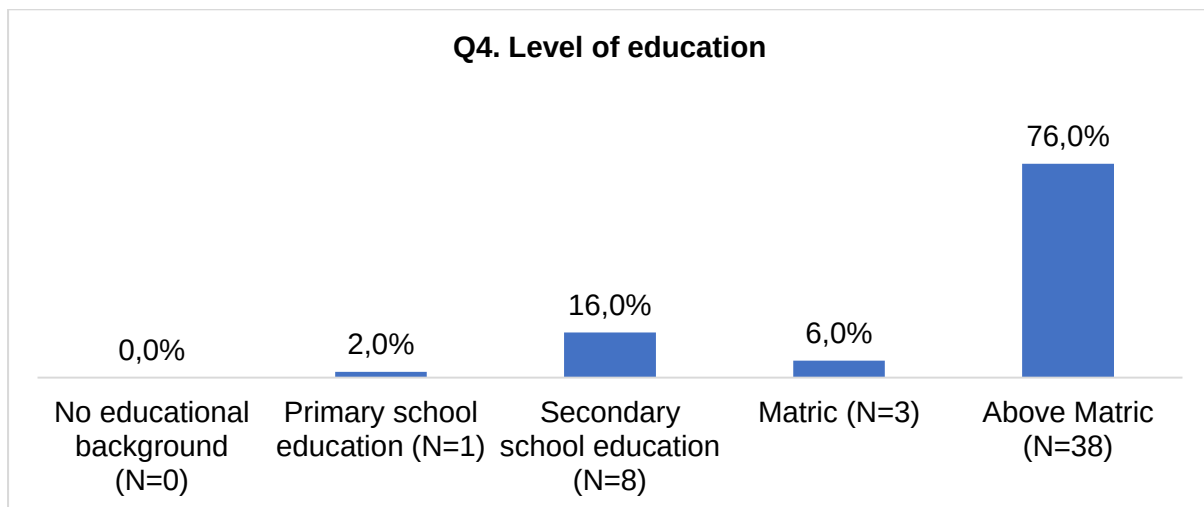


**Figure 4.1: Gender, race and age of respondents**

*Source: Primary data*

A look at figure 4.1 reveals that majority (52.0%) of the respondents are males. Furthermore, almost all (96.0%) of the respondents are of the Africa race group, whilst there were no respondent from the White or Indian race group and only 4% of the respondents were from the Coloured race group. In terms of age, majority (44.0%) of the respondents are within the range of 41 to 50 years old.

**Figure 4.2: Respondents level of education**



Source: primary data

None of the respondents were without any educational background. Majority (76%) of the respondents hold a qualification above the level of Matric while 16.0% of them attended a certain level of secondary education.

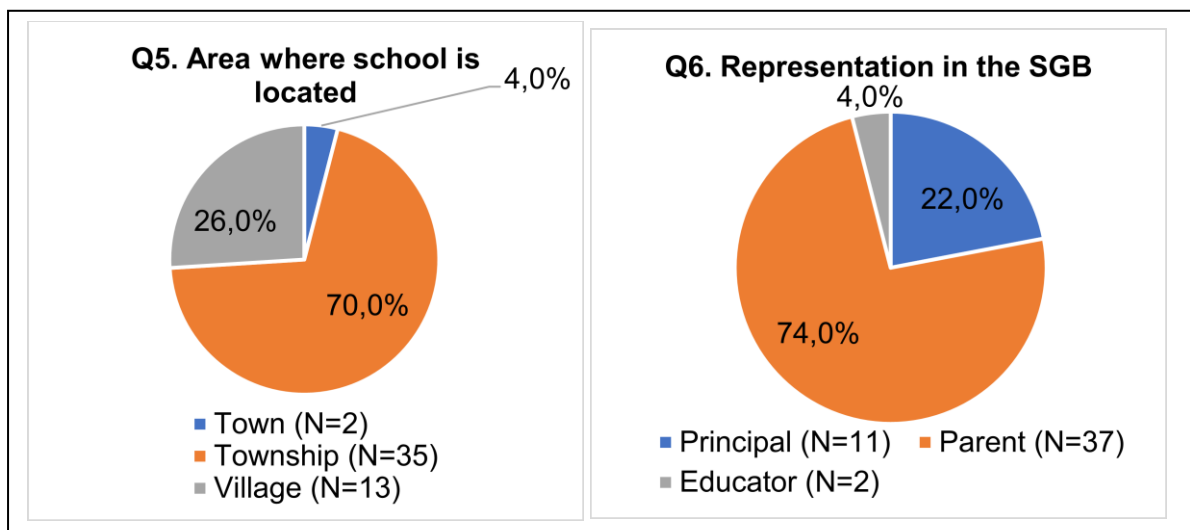


**Figure 4.3: School location and representation in the SGB**

Source: Primary data

From Figure 4.3, it is evident that majority (70.0%) of the respondents are SGB members in schools located in townships, and 74.0% of the respondents were acting in their capacity as parents. Although SASA 84 of 1996 stipulates that the statutory body of SGB should consist of parents, educators, non-teaching staffs and learners if the school is a high school (refer section 2.3.1), only 4.0% of the respondents in the current study were educators.

The SASA 84 of 1996 specifies that SGB members may not serves for more than three years, with the exception of a member who is a learner. Learners serving on the SGB may not do so for longer than 1 year, however they may be re-elected once their term has expired.

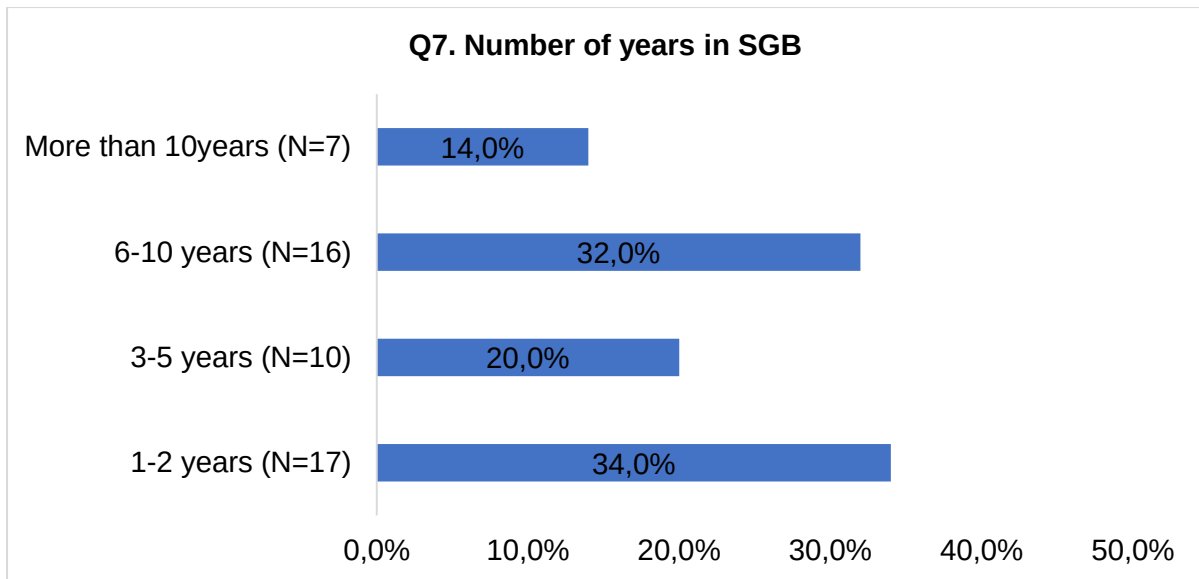


**Figure 4 4: Number of years as SGB member**

Source: Primary data

In terms of number of years serving in the SGB, more than a third (34.0%) of the respondents had been serving on the SGB for a period of 1-2 years, followed by those who served for a period of 6-10 years (32%). These implies that most of the SGB members served for more than three terms.

#### **4.3 PERCEIVED CHALLENGES FACING SGB MEMBERS**

The main objective of the study was to explore the requirement and conduct of financial training programmes for training of School Governing Bodies by the Department of Education in the North West Province. To attain this objective, respondents were asked to rate their responses on a five-point Likert-type response ranging from 1 = strongly disagree to 5 = strongly agree. The responses were combined by merging 'strongly agree' with 'agree' to denote 'agreement', while strongly 'disagree' and 'disagree' to represents 'disagreement'. Results gathered in this respect are shown in Table 4.1 below.

**Table 4.1: Challenges face in managing school funds**

| Variables |                                                                                                                          | Agreement |      | Neutral |      | Disagreement |      |
|-----------|--------------------------------------------------------------------------------------------------------------------------|-----------|------|---------|------|--------------|------|
|           |                                                                                                                          | n         | %    | n       | %    | n            | %    |
| Q8        | Have adequate knowledge of the school act (N=50)                                                                         | 27        | 54.0 | 14      | 28.0 | 9            | 18.0 |
| Q9        | Can interpret the school act correctly (N=50)                                                                            | 32        | 64.0 | 11      | 22.0 | 7            | 14.0 |
| Q10       | Are inadequately prepared for their leadership position (N=50)                                                           | 38        | 76.0 | 0       | 0.0  | 12           | 24.0 |
| Q11       | Lack the necessary skills, knowledge and competency to lead and manage school's funds effectively and efficiently (N=50) | 37        | 74.0 | 8       | 16.0 | 5            | 10.0 |
| Q13       | Low level of education (N=50)                                                                                            | 24        | 48.0 | 18      | 36.0 | 8            | 16.0 |

|     |                                                                                             |    |      |    |      |    |      |
|-----|---------------------------------------------------------------------------------------------|----|------|----|------|----|------|
| Q14 | Do not understand the language used within the financial training (N=50)                    | 21 | 42.0 | 19 | 38.0 | 10 | 20.0 |
| Q15 | Do not understand the financial training methods used by the department of education (N=50) | 23 | 46.0 | 19 | 38.0 | 8  | 16.0 |

Source: Primary data

A review of Table 4.1 reveals that more than half (54.0%; n=27) of the respondents have the adequate knowledge of the school act and can interpret the school act correctly (64.0%; n=32), but agree that they are inadequately prepared for their leadership position (76.0%; n=38). Furthermore, majority (74.0; n=37) of the respondents agreed that they lack the necessary skills, knowledge and competency to lead and manage school's funds effectively and efficiently due to low level of education (48.0; n=24). Most (42.0%; n=21) of the respondents agreed that they do not understand the language used within the financial training. Finally, almost a half (46.0%; n=23) of the respondents agreed that they do not understand the financial training methods used by DoE.

#### 4.4 FINANCIAL TRAINING

Finance is referred to as the process of managing money and is concerned with the process, institutions, markets and instruments involved in the transfer of money among individuals, institutions such as schools; and government (Nqata, 2018). This section seeks to determine whether SGB members have the necessary skills and knowledge to effectively and efficiently manage school funds; and to determine whether the Department of Education in the North West is providing adequate financial training to SGB members. To attain these objectives, respondents were asked to rate their responses on a five-point Likert-type response ranging from 1 =

strongly disagree to 5 = strongly agree. The responses were combined by merging 'strongly agree' with 'agree' to denote 'agreement', while strongly 'disagree' and 'disagree' represents 'disagreement'. Results gathered in this respect are shown in Table 4.2 below.

**Table 4.2: Financial training**

| Variables |                                                                                            | Agreement |      | Neutral |      | Disagreement |       |
|-----------|--------------------------------------------------------------------------------------------|-----------|------|---------|------|--------------|-------|
|           |                                                                                            | n         | %    | n       | %    | n            | %     |
| Q16       | The SGB members in my school display a strong sense of financial accountability (N=50)     | 13        | 26.0 | 0       | 0.0  | 37           | 74.0  |
| Q17       | SGB in my school is experiencing financial mismanagement (N=50)                            | 43        | 86.0 | 0       | 0.0  | 7            | 14.0% |
| Q18       | The Department of Education is providing adequate financial training to SGB members (N=50) | 2         | 4.0  | 14      | 28.0 | 34           | 68.0  |
| Q19       | The finance committee keeps accurate records of training held (N=50)                       | 10        | 20.0 | 26      | 52.0 | 14           | 28.0  |
| Q20       | The educators are consulted when drawing up the financial planning                         | 19        | 38.0 | 18      | 36.0 | 13           | 26.0  |

|     |                                                                                                |    |      |    |      |    |      |
|-----|------------------------------------------------------------------------------------------------|----|------|----|------|----|------|
|     | (N=50)                                                                                         |    |      |    |      |    |      |
| Q21 | The financial policy gives direction on the collection of school fees (N=50)                   | 22 | 44.0 | 23 | 46.0 | 5  | 10.0 |
| Q22 | Every member of the SGB has a copy of the financial school policy (N=50)                       | 15 | 30.0 | 18 | 36.0 | 17 | 34.0 |
| Q23 | There is transparency when dealing with school funds (N=50)                                    | 21 | 42.0 | 16 | 32.0 | 13 | 26.0 |
| Q24 | Financial training is not needed because financial school policy is easy to understand. (N=50) | 9  | 18.0 | 3  | 6.0  | 38 | 76.0 |

Source: Primary data

From Table 4.2, it was deduced that majority (74.0; n=37) of the respondents disagreed that SGB members of their schools display a strong sense of financial accountability. A greater proportion (86.0; n=43) of the respondents agreed that SGB in their schools are experiencing financial mismanagement. Majority (68%; n=) of the respondents disagreed that the Department of Education is providing adequate financial training to SGB members. In this regard, more than a half (52%; n=26) of the respondents are not aware if the finance committee keeps accurate records of training held. 38.0% (n=19) of the respondents agreed that educators are consulted when drawing up the financial planning.

Almost half (46%; n=23) of the respondents were not aware if the financial policy gives direction on the collection of school fees. This might be due to the fact that more than one third (34%; n=17) of the respondents disagreed that every member of

the SGB had a copy of the financial school policy. Moreover, most (42%; n=21) of the respondents agreed that there is transparency when dealing with school funds. Finally, more than three quarters (76%; n=38) of the respondents disagreed that financial training is not needed because the school financial policy is easy to understand.

#### 4.5 REGRESSION ANALYSIS

The influence of demographic factors such as number of years serving in SGB on perceived challenges and financial training pertaining to financial management of school funds were evaluated. The results are presented using ANOVA as shown in Table 4.3 and Table 4.4.

**Table 4.3: Regression analysis of the influence of number of years in SGB on perceived challenges**

|                      | SUM<br>SQUARE | OF<br>DF | MEAN<br>SQUARE | F     | SIG. |
|----------------------|---------------|----------|----------------|-------|------|
| Perceived Challenges | 29.499        | 8        | 3.687          | 5.376 | .000 |
| Residual             | 28.121        | 41       | .686           |       |      |
| Total                | 57.620        | 49       |                |       |      |

Source: Primary Data

The ANOVA results reveals that there was a statistically significant difference ( $F = 5.376$ ;  $P < 0.05$ ) between the SGB members based on number of years in SGB with regard to perceived challenges facing SGBs. With a mean square of 3.687 between

the four groups of working experience. This implies that years of experience as an SGB member is an important factor to enhance the financial management skills of SGB members. This result supports the study by Munge et al., (2016) whose findings indicate that years of experience were crucially important in enhancing financial management in public secondary schools in Nakuru County.

**Table 4.4: Regression analysis of the influence of number of years in SGB on financial training**

|            | MEAN<br>SQUARE | DF | MEAN<br>SQUARE | F     | SIG. |
|------------|----------------|----|----------------|-------|------|
| Regression | 25.651         | 9  | 2.850          | 3.566 | .002 |
| Residual   | 31.969         | 40 | .799           |       |      |
| Total      | 57.620         | 49 |                |       |      |

The ANOVA results shown in Table 4.4 reveal that there was a statistically significant difference ( $F = 3.566$ ;  $P < 0.05$ ) between the SGB members based on number of years in SGB with regard to financial training of SGBs. With a mean square of 2.850 between the four groups of working experience. This implies that years of experience as an SGB Member is an important factor to enhance the financial training programmes for SGBs members.

#### **4.6 SUMMARY**

This chapter performed the analysis and interpretation of the empirical data collected from 50 SGB members in 20 selected schools in the Mahikeng area, in the North West Province of South Africa. The data was analysed with the aid of SPSS. The

findings revealed that SGB members were not adequately prepared for their leadership position as they do not clearly understand the school's financial policy and the legal framework regulating the management of school funds. A regression analysis revealed that there was a statistically significant difference between the SGB members based on number of years serving in the SGB with regard to perceived challenges facing SGBs and financial training of SGBs. The next chapter provides the summary, conclusions and recommendations.

## **CHAPTER 5**

### **SUMMARY, CONCLUSIONS AND RECOMMENDATIONS**

#### **5.1 INTRODUCTION**

The objectives of the study were to explore the requirement and conduct of financial training programmes for training of School Governing Bodies by the Department of Education in the North West Province; to explore the perceptions of SGB members in the North West Province with regard to managing school funds; to determine whether SGB members have the necessary skills and knowledge to effectively and efficiently manage school funds; and to determine whether the Department of Education in the North West is providing adequate financial training to SGB members. To attain these objectives, Chapter one of the study provides a detail background and contextualisation of the study, as well as the research problems and questions which guided the study. In Chapter two, existing literature relating to the phenomenon under investigation were reviewed. Chapter three of the study explained in detail the research design and methodology adopted to obtain empirical data necessary to answer the research questions of the study. Analyses and interpretations of the empirical data was performed in Chapter four. The final chapter of the study provides a detailed summary of the findings emanating from the entire study. From these findings, conclusion and recommendations will be made.

This chapter commences by providing a summary of the main findings for the study, followed by conclusions reached. From these conclusions, constructive recommendations will be provided. The chapter further provides the limitations of this study and concludes by providing recommendations for future studies.

#### **5.2 SUMMARY OF FINDINGS**

From the demographic perspective, the findings revealed that majority of the SGB members in the North West Province are males from the African race within the range of 41 to 50 years of age. Most of these SGB members holds a qualification above the level of National Senior Certificate (NSC), also refer to as Matric, and

where acting in their capacity as parents who have been serving as SGM members for a period of 1-2 years. These findings are in line with the SASA No. 84 of 1996 which specifies that majority of SGB members should consist of parents, and may not serve for more than three years, with the exception of a member who is a learner.

### **5.2.1 Summary in responds to each of the research question**

This section provides a summary of the main finding from the literature and the empirical study. The findings will be presented according to each of the three research questions.

#### **Research question 1: What are the perceptions of SGB members with regard to their role in managing school funds?**

In response to research question one, the findings indicated that SGB members' perceptions differ with regard to their role in managing school funds. This finding is in line with a study by Dibete and Potokri (2018) who investigated the perceptions of SGBs about their role in managing school funds in no fee schools in South Africa and found that SGB members do not have the required knowledge, skills and experiences to manage school funds effectively due to SGBs members' literacy level and limited financial management training.

#### **Research question 2: Does SGB members have the necessary skills and knowledge to effectively and efficiently manage school funds?**

The study revealed that most of the SGB members have adequate knowledge of the school act and could interpret the school act correctly. However, they are inadequately prepared for their leadership position as they lack the necessary skills, knowledge and competency to lead and manage schools' funds effectively and efficiently due to low level of education. Furthermore, the language used by the DoE to conduct training was perceived as a barrier as most of the SGB members lacked the basic English proficiency skills, and as such, did not understand the financial training methods used by DoE. These findings are in line with a study conducted in

South Africa by Nqata (2018) whose findings revealed that lack of essential financial management knowledge and skills is one of the challenges faced by most SGBs.

Findings from the study revealed that majority of the SGB members do not have a strong sense of financial accountability and are experiencing financial mismanagement. Findings further revealed that SGB members are not aware if the financial policy gives direction on the collection of school fees, as such there is no transparency when dealing with school funds. These findings are parallel to the study by Hlongoane (2016) whose findings revealed that SGBs in South Africa are facing a number of challenges such as financial mismanagement and corruption, and they are incompetent to implement financial policies as prescribed by SASA. Hlongoane (2016) further found that these challenges are as a result of inadequate financial management skills, lack of understating of SASA No, 84 of 1996 as well as inadequate financial training, monitoring and support by the DoE.

### **Research question 3: Does the Department of Education provide adequate financial training to SGB members?**

Findings further revealed that the majority of SGB members are in support of the finance committee keeping accurate records of training held, and that DoE is not providing adequate financial training to SGB members. Although every member of the SGB had a copy of the school financial policy, most of them were of the opinion that continued financial training is needed because school financial policies are difficult to understand. These findings indicate that SGBs need effective and continued financial training as majority of them do not understand the school financial policies. On the other hand, findings from literature (see Nqata, 2018) points out that if SGB members are being trained effectively on managing school funds; their knowledge, skills and behaviours towards management of school funds could improve.

## **5.3 CONCLUSIONS**

Following the findings from this study the researcher concluded that SGB members have different perceptions and understanding of the of the financial programmes

used for training SGBs by DoE in North West as well the challenges of financial management in their schools. Some of the SGB members do not understand their roles as SGB members. These challenges were primarily due to the low level of financial literacy among SGB members as well as lack of on-going financial programmes offered to train SGBs.

Financial management training can assist members of SGBs in performing their roles and responsibilities as well as managing school funds effectively. Preparation and presentation of accurate, complete and reliable financial reports in public schools which include ordinary and special schools lie with the SGBs. The problem statement of the current study highlighted the lack of financial management training and guidelines for managing school funds across most public schools in South Africa.

The study revealed that SGB members are not adequately prepared for their leadership position as they do not clearly understand the school financial policy and the legal framework regulating the management of school funds. The study concluded that SGBs in the North West Province of South Africa do not have the adequate skills and competencies to manage school funds. Although the DoE is providing training to SGBs, the study concluded that adequate training is not focussed towards management of school finances. Furthermore, understanding financial policy is one of the critical challenges faced by SGB members. The study recommends that the DoE should review the content of financial training programmes offered to the SGBs and align the training to the functions of the SGBs.

#### **5.4 RECOMMENDATIONS**

This study indicated that each SGB member has a different understanding of the financial management task of SGB. Hence, the study recommends SGB members' financial management skills and knowledge should be enhanced through effective training.

The study recommends that the DoE should review the content of financial training programmes offered to the SGBs and to align the training to the functions of the

SGBs. Furthermore, the DoE should outsource the training of SGBs to qualified trainers who will also perform a continued monitoring and support to SGBs on the management of school funds.

SGBs from various schools should consider partnering and collaborating so as to increase financial prudence. Training on financial management should be conducted in a language that would be understood by SGBs and the DoE should capacitate the SGBs with sufficient knowledge and skills to improve their performance in managing school finances.

## **5.5 LIMITATIONS OF THE STUDY**

This study experienced certain limitations. Firstly, the study was limited to the North West Province of South Africa. The study was also limited in terms of the research design and methodology. Some SGB members such as learners were not included in the study because data was collected in November, which was the month of final end of year examination. In this regard, the results would have reflected different point of views if learners participated in the study. therefore, the findings for this study will not be over generalised to the entire SGBs in South African.

## **5.6 RECOMMENDATIONS FOR FUTURE RESEARCH**

Future research should be conducted on a longitudinal basis using qualitative research approach with interviews so as to capture a better reflection of the financial programmes used for training SGBs by the DoE. These studies should include all SGB members, including students. Furthermore, future research should be conducted on a comparative basis using two or more provinces so as to obtain an in-depth understanding of the financial management challenges faced by SGBs in South Africa.

## **5.7 SUMMARY**

The findings from this study were in line with the SASA No. 84 of 1996 which specifies that majority of SGB members should consist of parents, and may not serves for more than three years, with the exception of a member who is a learner.

SGBs members' perceptions differed with regard to their role in managing school funds. SGB members displayed adequate knowledge of the school act and could interpret the school act correctly. However, they proved to be inadequately prepared for their leadership position as they lacked the necessary skills, knowledge and competency required to lead and manage schools' funds effectively and efficiently, due to low level of education. The study recommends that the DoE should review the content of financial training programmes offered to the SGBs and align the training to the functions of the SGBs. Furthermore, the DoE should outsource the training of SGBs to qualified trainers who will also perform continued monitoring and support to SGBs on the management of school funds. Future research should be conducted on a longitudinal basis using qualitative research approach with interviews so as to capture a better reflection of the financial programmes used for training the SGBs by the DoE.

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## **APPENDIX A: PARTICIPANT INFORMATION SHEET**

**RE: Exploring financial programmes used for training of School Governing Bodies by the Department of Education in North West**

**Dear Participant**

My name is Mogopodi Rethabile Setshogoe, and I am currently doing research on mini-dissertation as part of my MBA degree under the supervision of Professor Ravinder Rena at the North-West University Business School. We are inviting you to participate in a study entitled to “Exploring the requirement and conduct of financial training programmes for training of School Governing Bodies by the Department of Education in the North West Province.”

The main objective is to explore the requirement and conduct of financial training programmes for training of School Governing Bodies by the Department of Education in the North West Province. We wish to obtain the perceptions of SGB members in the North West Province with regard to managing school funds. You have been chosen to take part in this survey because you are an SGB member and we want to know what your perceptions with regard to the inadequate financial programmes used for training the SGBs by the Department of Education in North West.

There are no foreseeable risks involved in taking part in this research beyond those experienced in everyday life. While there is no financial or other direct benefit of participating in this survey, your experience as a current SGB member can however contribute much towards developing programs to assist in developing financial programmes to be used to train the SGBs by the Department of Education. I would therefore greatly appreciate your contribution. It will take approximately 10 to 15 minutes of your time to complete the questionnaire.

Your response is used only for the purpose of this study. However, data may be used for other purposes, such as a research report, journal articles and/or conference proceedings. Your participation in this study is completely voluntary. If

you choose not to participate or to withdraw from the study at any time, there was no penalty. Also, if you do not wish to answer any of the questions, you may skip them and move on to the next question. The information recorded is confidential; your name is not being included in the study. No identifying information of the participants will be shared with anyone who is not directly connected with the project.

Hard copies of your answers will be stored by the researcher for a period of five years in a locked cupboard/filing cabinet in the researcher private home or the research supervisors' office for future research or academic purposes. Electronic information will be stored on a password protected computer. Future use of the stored data will be subject to further Research Ethics Review and approval if applicable. Hard copies of your answers will be shredded, and/or electronic copies permanently deleted from the hard drive of the computer through the use of a relevant software programme after a period of five years.

This study has received written approval from the NWU Economic and Management Sciences Research Ethics Committee (EMS-REC) and written permission from the North West Department of Education. A copy of the approval letter can be obtained from the researcher if you so wish. Upon completion of the study, I undertake to provide the Department of Education and your school with a bound copy of the full research report.

Thank you for your participation

Yours sincerely

Mogopodi Rethabile Setshogoe

Researcher

Contact Number: 064 654 0172

E-mail: [Rethabile.setshogoe@gmail.com](mailto:Rethabile.setshogoe@gmail.com)

*Thank you for taking time to read this information sheet and for participating in this study*

## APPENDIX B: CONSENT TO PARTICIPATE IN THIS STUDY

I, \_\_\_\_\_ (SGB member name), confirm that the person asking my consent to take part in this research has told me about the nature, procedure, potential benefits and anticipated inconvenience of participation.

I have read (or had explained to me) and understood the study as explained in the information sheet.

I have had sufficient opportunity to ask questions and am prepared to participate in the study.

I understand that my participation is voluntary and that I am free to withdraw at any time without penalty (if applicable).

I am aware that the findings of this study were processed into a research report, journal publications and/or conference proceedings, but that my participation was kept confidential unless otherwise specified.

I agree to complete the survey questionnaire.

I have received a signed copy of the informed consent agreement.

SGB member Name & Surname..... (please print)

SGB member signature.....Date.....

Witness Name & Surname..... (please print)

Researcher's Name & Surname..... (please print)

Researcher's signature.....Date.....

## APPENDIX C: QUESTIONNAIRE

### SECTION 1: DEMOGRAPHICS INFORMATION

Answer each question (for statistics purposes only). Please mark with an 'X' in the box on the right the number that best characterises your response. Your honest responses and complete participation are important to the ultimate success of this study. Thank you, in advance, for your participation.

|    |                              |   |                            |  |
|----|------------------------------|---|----------------------------|--|
| Q1 | What is your gender?         |   |                            |  |
|    |                              | 1 | Female                     |  |
|    |                              | 2 | Male                       |  |
| Q2 | What is your race            |   |                            |  |
|    |                              | 1 | African                    |  |
|    |                              | 2 | Coloured                   |  |
|    |                              | 3 | White                      |  |
|    |                              | 4 | Indian                     |  |
|    |                              | 5 | Others (please specify)    |  |
| Q3 | What is your age?            |   |                            |  |
|    |                              | 1 | 18 – 30                    |  |
|    |                              | 2 | 31 – 40                    |  |
|    |                              | 3 | 41 – 50                    |  |
|    |                              | 4 | Above 51                   |  |
| Q4 | Level of education           |   |                            |  |
|    |                              | 1 | No educational background  |  |
|    |                              | 2 | Primary school education   |  |
|    |                              | 3 | Secondary school education |  |
|    |                              | 4 | Matric                     |  |
|    |                              | 5 | Above matric               |  |
| Q5 | Area where school is located |   |                            |  |
|    |                              | 1 | Town                       |  |

|    |                                                |   |                    |  |
|----|------------------------------------------------|---|--------------------|--|
|    |                                                | 2 | Township           |  |
|    |                                                | 3 | Village            |  |
|    |                                                | 4 | Farm               |  |
| Q6 | what is your current representation in the SGB |   |                    |  |
|    |                                                | 1 | Parent             |  |
|    |                                                | 2 | Principal          |  |
|    |                                                | 3 | Educator           |  |
|    |                                                |   |                    |  |
| Q7 | Number of years in the SGB                     |   |                    |  |
|    |                                                | 1 | 1-2 years          |  |
|    |                                                | 2 | 3- 5 years         |  |
|    |                                                | 3 | 6 – 10 years       |  |
|    |                                                | 4 | More than 10 years |  |

## SECTION 2: PERCEIVED CHALLENGES FACING SGB MEMBERS

We are interested in learning about your perceptions with regard the challenges facing SGBs in your school. Listed below are several items, each anchored by a five-point Likert-type response. Using the scale below, please indicate the extent to which you disagree or agree with each of the statements. In responding to the items, please mark with an 'X' the number that best characterises your response. **1=Strongly disagree, 2=Disagree, 3=Neutral, 4=Agree, 5=Strongly agree.**

| The SGB members in my school |                                           | 1 | 2 | 3 | 4 | 5 |
|------------------------------|-------------------------------------------|---|---|---|---|---|
| Q8                           | Have adequate knowledge of the school act |   |   |   |   |   |

|     |                                                                                                                   |  |  |  |  |  |
|-----|-------------------------------------------------------------------------------------------------------------------|--|--|--|--|--|
| Q9  | Can interpret the school act correctly                                                                            |  |  |  |  |  |
| Q10 | Are inadequately prepared for their leadership position                                                           |  |  |  |  |  |
| Q11 | Lack the necessary skills, knowledge and competency to lead and manage school's funds effectively and efficiently |  |  |  |  |  |
| Q12 | Need adequate financial training                                                                                  |  |  |  |  |  |
| Q13 | Low level of education                                                                                            |  |  |  |  |  |
| Q14 | Do not understand the language used within the financial training                                                 |  |  |  |  |  |
| Q15 | Do not understand the financial training methods used by the department of education                              |  |  |  |  |  |

### SECTION 3: FINANCIAL TRAINING

We are interested in learning about your perceptions with regard to the level of training provided by the DoE to SGBs with regard to management of finance. Listed below are several items, each anchored by a five-point Liked-type response. Using the scale below, please indicate the extent to which you disagree or agree with each of the statements. In responding to the items, please mark with an 'X' the number

that best characterises your response. **1=Strongly disagree, 2=Disagree, 3=Neutral, 4=Agree, 5=Strongly agree.**

|     |                                                                                     | 1 | 2 | 3 | 4 | 5 |
|-----|-------------------------------------------------------------------------------------|---|---|---|---|---|
| Q16 | The SGB members in my school displays a strong sense of financial accountability    |   |   |   |   |   |
| Q17 | SGB in my school is experiencing financial mismanagement                            |   |   |   |   |   |
| Q18 | The department of education is providing adequate financial training to SGB members |   |   |   |   |   |
| Q19 | The finance committee keeps accurate records of training meetings held              |   |   |   |   |   |
| Q20 | The educators are consulted when drawing up the financial planning                  |   |   |   |   |   |
| Q21 | The financial policy gives direction on the collection of school fees               |   |   |   |   |   |
| Q22 | Every member of the SGB has a copy of the                                           |   |   |   |   |   |

|     |                                                                                         |  |  |  |  |  |
|-----|-----------------------------------------------------------------------------------------|--|--|--|--|--|
|     | financial school policy                                                                 |  |  |  |  |  |
| Q23 | There is transparency when dealing with school funds                                    |  |  |  |  |  |
| Q24 | Financial training is not needed because school financial policy is easy to understand. |  |  |  |  |  |