

School funding for Public schools: Problems experienced by
school principals Zeerust Area Project Office of the Central
region

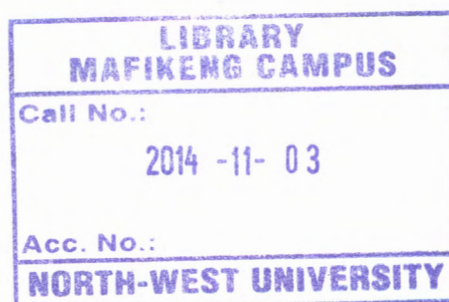
by

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Campus

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DECLARATION

I, the undersigned, declare that the dissertation for the degree of Master in Business Administration at the North West University (Mafikeng Campus) hereby submitted, has not been previously submitted by me for any degree at this or any other University, that is my work in design and execution and that all material contained herein has been duly acknowledged.



Y.S. Noge

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ABSTRACT

The purpose of the research study was to determine from the literature problems experienced by schools on funding in terms of the National Norms and Standards for School Funding.

A questionnaire was used to collect data from the respondents and a qualitative research method was conducted. The target group were principals of schools in the Zeerust Area Project Office as part of the Central Region in the North West Province. Hundred and twelve respondents took part in the survey only hundred principals participated in the study.

Empirical investigation revealed that government funding was one source of income for schools and that funding of schools was decentralised to provinces. Enrolment was one of the criteria used to determine funds provided to schools. Parents' contribution was determined to a large extent by the poverty level of the families around schools. No fee schools were mostly found in rural areas. The study therefore, recommended that a sound advocacy should be put in place in order to establish the norms of no fee schools for indigent parents and that the affluent parents to understand that they have to pay school fees. Mechanisms used to determine the allocation of school funds should be reviewed. There has to be a programme to benefit small schools with insufficient funds. Companies have to adopt schools and assist especially with physical resources like photocopiers and computers. There has to be enough training for management to enable them to raise funds and communicate with big companies.

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CHAPTER 1

1. ORIENTATION

1.1 BACKGROUND INFORMATION

This study was intended to investigate the problems experienced by schools in funding of schools in terms of Section 35 of South African School Act, 1996, (SASA) (no. 84 of 1996), and Section 3 (4) (g) of the National Education Policy Act, 1996 (NEPA) of the National Norms and Standards for School funding. Prior to the introduction of the acts the main source of income to manage the day- to- day affairs of the school was the school fees contributed by parents and the raising of funds by concerts, bazaars, raffles and requesting donations from the private sector. Presently the schools receive an allocation from the department of education in order to assist them in managing the schools efficiently and effectively. The introduction of the acts was meant to bridge the gap of disparities caused by the apartheid government in that historically poor communities would receive more money than affluent communities. The situation does not meet the needs of all schools satisfactorily. The study therefore was undertaken to identify the problems experienced by schools and to recommend a more equitable system of funding.

The funding of education in South Africa has undergone fundamental changes. Education was managed and funded along racial lines under the apartheid government. The Whites received the highest funding followed by Indians, Coloureds and lastly the Africans. White schools were well resourced followed by Indians, Coloureds and African schools were neglected. Parents of the three racial groups were empowered to take part in the education of their children whereas among the blacks it was not the case, the white paper on equal education was there but it was not implemented. For a long time the education of African children was the responsibility of missionaries funded by different churches. The first principle of the policy demanded equal educational opportunities and equal standards of education for all the inhabitants of South Africa. Brown stressed the right to education he indicated that education should be accessible to all. He further stated that the UNESCO's normative action on non discrimination and

equal educational opportunities affirmed its role of ensuring normative action in the bid to secure equal education. He linked the principle of non discrimination and equality to state obligation (Brown, 2007: 1).

After 1952 when the nationalists party took over government education for Africans was so structured that it was inferior to that of the whites. It was intended and structured in such a way that Africans should only be able to read and write in order to serve the master well, that is whites who were then, the only employers of blacks. In the early seventies black children started to demand a better education and to be taught in English rather than through the medium of Afrikaans. They demanded to study science and commercial subjects to do artisan work like their white counterparts. On account of the pressure applied for changes from the black majority the white minority government began to increase funding for black schools. After the first democratic elections in 1994 all different education departments had to be merged to form one non-racial, non-sexist and non- discriminatory national education system.

The South African Schools Act (SASA) Act 84 of 1996 was enacted and its primary aim was to abolish the previous different education laws. This act vested the management and funding of schools on the authority of the National Minister of Education. The National Minister of Education in turn mandated the Provincial Minister of Education to implement the national education decisions in their provinces.

1.2 STATEMENT OF THE PROBLEM

Prior to 1994 the National Department of Education played a minimal role in the administration and funding of schools. Different education departments had their own educational management acts divided along racial barriers. These acts gave guidelines on how to administer schools and how schools were funded. The different departments funded schools by providing limited resources like textbooks, schools buildings in urban areas and books for school libraries. In order to administer schools on a day-to-day basis in terms of transport, telephone, water and electricity among other things, school fees had

to be used. Schools belonging to affluent communities were and still are well resourced and those from poor communities were and still are under resourced.

Some parents no longer pay school fees even those who used to pay school fees because of circumstances like political campaigns, when politicians' campaign for a position either in local government or the national positions they tend to tell people that school fees is abolished. Parents take heed of such utterances and principals would notice a change and when they inquire they will learn that it was announced in the media that school fee is abolished. When announcements are made full explanation is not given they only concentrate on the core of the announcement and not the whole explanation of the situation. The National Minister of Education, Naledi Pandor, in August 2006 on TV announced that as from 2007 school fees would not be paid. Parents do not understand that there are parents who have to pay and those who are not to pay because when it was announced there was no explanation of categories of total exemption, partially exemption and full exemption and conditional exemption. It is a contradiction because principals called parents and explained all the categories. Parents who afford to pay school fees do not want to pay school fees because of the announcement made.

Citizens would pay for something they perceive to have value, therefore money is invested in education because it is perceived to have value i.e. education is financed or funded. Pretorius and Lemmer (1998:68) states that education has individual and social benefits. Social benefits of education are that a literate, educated population which leads to stability in a country and the economy benefits from skilled educated people. Individual benefits occur through the development of a person's personality, critical insight and by providing a person with appropriate skills from which he/she can earn a living (Pretorius and Lemmer 1998:65). Thus, it is important that parents should contribute towards the education of their children.

A number of parents misunderstand the term "free education" they believe that this means they do not have to pay for the education of their children. Therefore they do not feel obligated to pay for the education of their children even if they can afford to contribute. In South Africa the government expects parents who can afford to pay

school fees for their children to do so but parents who are unable to pay for their children are exempted fully, partially or conditionally depending on their social status (SASA, 1996). Full exemption means that the household does not have any source of income; partially exemption means that the household has income but it is not enough to cater for all their needs if they have to contribute part of their earnings to the education of their children. This is calculated using their salaries slip. Conditional exemption means that parents are in debt and for a certain period of time they can be exempted until they manage their liabilities and resume payment.

According to the researcher countries in the literature study are committed to free education at least in the primary school phase. Free education is often linked with compulsory education, since it is difficult to enforce primary education if it is not provided free of charge by the government. The democratic government in South Africa provides free and compulsory education for all up to grade nine or when a child is fourteen years old (RSA, 1996 (a) (6) :66). It is the researcher's belief that there is no free education; education always cost something and somebody has to pay for it. Even when the government funds education, education is still not free, because in any case, the state derives its funds from the people. However, it is common to use the phrase "free education" to describe education that is not paid for.

Free education is defined differently in various contexts. In one country a government may pay for text - books and transport, while these may be excluded in other countries. According to Pretorius and Lemmer (1998: 67) there are two major factors that make it difficult for governments to sustain education demands:

- The population growth which is detrimental to the equitable provision of education in developing countries where education demand is generally high; and
- The economic decline for example high inflation rates are an indication of the economic decline. The oil crisis, the negative impact of the high dollar exchange rates and the mounting foreign debts, all of these affect the developing and developed countries negatively but developing countries

are more affected than developed countries because they have to pay more for imported goods.

1.3 PURPOSE OF STUDY

The purpose of this research was to explore ways and means, which would address disparities between allocations provided to schools by the department of education whereby one of the mechanisms used benefit schools with high enrolment when money is allocated to schools. Allocation of funds is distributed based on the number of learners enrolled at a school per year. A learner is allocated a certain amount per year. A quintile system is used to determine funding but the uniqueness of a school is disregarded. The amount allocated to small schools does not satisfy all the needs of the school. It stands to reason that a school with high enrolment will receive more money as compared to a school with low enrolment. Both schools use physical resources like photocopiers, computers and they go to the same Area Project office to fetch mail to attend workshops, meetings. They spend equal money for transport the funds of a school with low enrolment are quickly depleted. The study should serve as a standard or a point of reference to the education department when allocation of funds is effected to schools. The study is intended to provide solutions on how to allocate funds to all the schools irrespective of low enrolment or high enrolment, previous Model C school or not. The study is necessary because the outcomes should help the education department to take into cognisance other factors not included in the allocation of funds. It should serve as a guideline to verify good delivery of quality education.



Every school is unique therefore in this study the individuality of each school was taken into consideration. The monitoring tool for money allocated to schools should also indicate that schools use the funds efficiently and effectively. The study investigated financial problems experienced by schools in Zeerust Area Project Office (APO). The intention was to find out how schools coped with money allocated to them and to try and establish ways that would make the funding system effective for all schools. Zeerust APO is a cluster that is very remote, scattered and the furthest school is $\pm 200\text{km}$ away from the area project office. The research was limited to funding of schools. The focus

area was to determine whether schools should be funded according to their level of poverty or according to enrolment. In addition the study examines how schools survive with limited funds allocated to them and how improvement could be effected to allow them to run efficiently and effectively.

More specifically, the study had the following aims:

Aim 1 To determine from the literature the nature and scope of school funding.

Aim 2 To determine empirically the problems experienced by school principal with regard to school funding.

1.4. METHOD OF RESEARCH

1.4.1 Literature Study

The literature study was conducted with the aim of gathering information from different countries on how schools were funded. The study concentrated on developing and developed countries. A dialogue – search with the following terms was conducted:

- School funding;
- School fee;
- User fees;
- Public school
- Free education
- Grants;
- No fee school;
- Free education; and
- Parental contribution.

1.4.2 Empirical investigation

A questionnaire was employed as a tool to gather information from the respondents.

1.4.2.1 Questionnaire

A well structured questionnaire was drawn and pre-tested. It was then distributed to principals in the Zeerust Area Project Office (ZAPO). The questionnaire contained information about the nature and scope of funding and problems experienced by principal in schools.

1.4.2.2 Population and sampling

The Zeerust Area Project Office (ZAPO) has one hundred and twelve (112) primary and secondary schools and all the schools were targeted for sampling. Purposefully, all principals were selected to participate in the study. Thus, a total number of hundred and twelve principals were used in the study.

1.5 DATA ANALYSIS

Analysis was captured in the form of frequencies and percentages using Microsoft excel. Graphs and tables were drawn to present the data collected.

1.6 ORGANISATION OF THE STUDY

The chapters in this study are divided as follows:

Chapter one: Orientation

Chapter two: Nature and Scope of school funding

Chapter three: Research methodology

Chapter four: Data analysis and interpretation of results

Chapter five: Summary, conclusions and recommendations

1.7 DEFINITIONS OF TERMS

- Public school

In England and Wales a public school is one of small number of prestigious historic schools. Public schools are open to the public which normally charge fees and are financed by bodies other than the state. Public schools are equivalent to private schools in South Africa. In most other English speaking nations, a public school does not charge tuition fees. The public school is financed by or controlled by the government. In the UK, Public schools are also known as state schools. In India the term public schools imply non governmental historically elite educational institutions. In US institutions of higher education subsidised by the state are also referred to as public schools, unlike secondary public schools, a tuition fee is charged. In Brazil the concept public school is used to denote education institutions owned by the Federal, State or City Governments. Public schools do not charge tuition fees (www.auswaertiges.amti.de).

- School funding

Public schools are funded by the state in most of the countries. According to section 12(1) SASA (1996) the member of the executive council (of the provincial legislature) must provide public schools for the education of learners out of funds appropriated for this purpose. Funding is money provided by the government from the public revenue on an equitable basis in order to ensure the proper exercise of the right of learners to education and the redress of past inequalities in education provision. These funds received from the state must be, however, be supplemented by the school. Therefore in section 36 SASA (1996) a governing body of a public school must take all reasonable measures within its means to supplement the

resources by the state in order to improve the quality of education provided by the school to all learners at the school.

School fee refers to an amount of money paid by parents or, which is determined democratically by parents looking at the needs of the school on yearly basis. Subject to 39(1) SASA (1996) school fees may be determined and charged at a public school only if a resolution to do so has been adopted by the majority of parents attending a meeting. A parent is liable to pay the school fees determined in terms of section 39 unless or to the extent that he or she has been exempted from payment in terms of this act. The governing body of a public school may by process of the law enforce parents who are liable to pay school fees to contribute in terms of section 40 SASA (1996). For the purpose of this study, school fund refers to money contributed by the government as well as funds raised by the school to supplement the school's income that is the total capital of the school and school fees refer to money contributed by parents.

- Zeerust Area Project Office

According to the new dispensation in the North West Province, Zeerust Area Project Office is grouped into school clusters, namely Nietverdiend, Motswedi /Lerato and Zeerust. There are hundred and twelve primary and secondary schools in the area.

1.8 SUMMARY

From the presentation of the problem statement it is evident that there are challenges with regard to school fund and a need to establish ways which could help to address such challenges, especially for small schools and rural schools. The purpose of the study was to investigate the problem thoroughly using the appropriate research methods and the relevant literature. The following chapter focused on the scope and nature of school funding as disseminated to the public by the government. How the selected developed and developing countries fund their public schools.

CHAPTER 2

2. NATURE AND SCOPE OF FUNDING

2.1 Introduction

Chapter two provides the nature and scope of school funding as promulgated by the government of South Africa and the governments of other developing and developed countries. The chapter also reflects the discussion of concepts such as school fund, school fees, public school and Zeerust Area Project Office and the justification for school funds.



2.2 The term 'School fund'

The researcher believes that school fund is an umbrella word that embraces all the money received by the school for that year. It also means all the money available for a school in other words the source of income for a school. A school derives money from the following sources (Oosthuizen, et al., 1998: 183):

- Government funding – (taxes collected by the state) the government is committed to ensuring that every child has a right to go to school. There will never be enough money from the government alone to pay for all school expenses.
- Community – must play a part in raising funds for schools, because without additional money schools will not grow and the quality of education will not improve.
- Sponsors or donors – successful businessmen in an area may be approached to assist schools. Big organisations and companies in nearby cities and towns may also be requested to assist.
- Parents – parents may be obliged to contribute a certain amount, agreed upon to assist in the education of their children.

It is important at this stage to look at how schools funds are used. No institution or organisation can run without money hence school fund. Schools are faced with day to

day operations therefore tools are necessary to help the running of schools. According to Gildenhuys, (1993: 423) there are operation costs and capital costs that have to be taken care of in school finances. Operational costs are for items that are used and consumed on a frequent basis such as the following:

- Water and electricity;
- Stationery;
- Cleaning material;
- Transport; and
- Telephone bills.

While the capital costs refer to those expensive items which must be looked after and maintained such as:

- A new classroom construction;
- Classroom furniture;
- Library reference books;
- Play ground equipment; and
- A photocopier machine.

2.3 THE SCOPE OF SCHOOL FUNDING

The scope of school funding includes all the money allocated by the government, money paid to schools by parents or through donations and fundraising. The funds are used to fund all the activities that are necessary to deliver quality services of teaching and learning.

2.3.1 Background and South African legislative framework

According to the Bill of Rights in the Constitution of Republic of South Africa, 1996, (Act 108 of 1996), “everyone has the right to basic education, including adult basic education, and to further education.” South Africa has a single national education system which is organised and managed largely on the basis of nine provincial sub-systems.

Presently the constitution has given powers to provincial legislatures and governments to run educational affairs.

2.3.1.1 Educational Policy

The South African School Act, 1996 (Act 84 of 1996), provides for compulsory education for learners from the ages of seven up to sixteen or learners reaching the ninth grade, whichever occurs first.

After 1994 the education system had to be restructured in order to cater equally for the educational needs of all children. The National Education Policy Act of 1996 (NEPA 1996) established the general aims and objectives of the education system of the republic and the National Minister of Education had to determine the strategic policy direction. The act provides the basis for non-racial schooling, empowering provinces to achieve equity and redress in the delivery of education in the country. The National Minister of Education after a due process, gave notice in terms of Section 35 of the SASA (1996) of the National Norms and Standards for School Funding and the norms became national policy on 1 April 1999, in terms of section 35 of the SASA (no 84 of 1996) and section 3(4) (g) of the National Education policy act, 1996 (no 27 of 1996), of the national norms and standards for school funding (DoE, 1996).

According to the Departmental circular number 67 of 1999, schools were given an opportunity to apply to the provincial MEC to be allocated their funds in order for the school to administer them. The circular states that, " In terms of Section 21 of the South African School Act, School Governing Bodies (SGB) may apply in writing to the deputy Director General of the Department," to be allocated the following functions (DoE, 1996):

- To maintain and improve the schools property, buildings and grounds occupied by the school; including hostels, if applicable;
- To determine the extra-mural curriculum of the school and the choice of subject options in terms of provincial policy;

- To purchase textbooks, educational materials or equipment for the school;
- To pay for services to the school; and
- Other functions with this act and any applicable law.”

It furthermore states that: "In terms of section 21(b) the member of the executive council (MEC) may, by notice in the Provincial Gazette, determine that some SGBs may exercise one or more functions without making an application contemplated in section 21(1)" if (DoE, 1996):

- “She or he is satisfied that the SGB concerned have the capacity to perform such functions effectively; and
- There is reasonable and equitable basis for doing so.”

Public schools are therefore divided into two categories that is section 20 schools and section 21 schools. Section 20 schools are those that have no capacity to manage the funds allocated to them by the education department. The provincial director of education keeps the funds of such schools. Schools submit requisitions, which are paid for on their behalf. The department also pays for all services like water and electricity (DoE,1996).

Section 21 schools are responsible for managing their funds, which are paid over to them. Those schools have the financial knowledge and capacity to manage their funds. For the purpose of allocating funds to schools and to redress the inequalities of funding in the past, schools are graded according to a quintile system. The quintile system is a system where a school is graded according to the socio economic level of the community around the school, its sanitation, buildings, water, electricity and the level of literacy of the community.

The current system of budgeting and spending for schools is divided according to the following **Cost allocation categories** (DoE, 1996):

Capital Cost allocation:

- It is for new classrooms and construction including provision for water and electricity, sewerage and telephone services on site. The provincial department is the one that identifies schools in need and helps them accordingly and it specifically controls this category.

Recurrent allocation: This allocation is the one that is allocated to schools according to the basis of needs determined according to:

- Condition of the school and;
- Relative poverty of the school community

In the recurrent allocation the following targets are used:

- School quintiles, from the poorest to the least poor;
- Per learner expenditure indexed to average of 100;
- Other current and small capital equipment cost-text books, Learner Teacher Support Material (LTSM) stationery, equipment and media collections;
- Immovable capital improvements cost for example maintenance of buildings; and
- Easily separable recurrent costs for example supplies and services.

Using the following “Resource target table” Table 2.1

School quintiles, from poorest to least Poor	Expenditure allocation	Cumulative percentages of schools	Cumulative percentage of non-personnel and non-capital recurrent expenditure	Per learner expenditure indexed to average 100
Poorest 20%	35% of the resources	20%	35%	175
Next 20%	25% of the resources	40%	60%	125
Next 20%	20% of the resources	60%	80%	100
Next 20%	15% of the resources	80%	95%	75
Least poor 20%	5% of the resources	100%	100%	25

Adapted from (www.polity.gov.za)

The information in the table shows that per learner expenditure in the poorest 20% quintile is seven times more than the least poor. The purpose of this allocation is to provide all learners with minimum package of learning materials equivalent to at least R100.00 per learner. However, if the total budgetary allocation for this item is insufficient, the department must ensure that priority is given to poorer learners according to the quintile system. Funds are allocated according to how the school is graded, in the quintile system. It is a system where a school is graded according to its level of poverty and the physical resources it possesses. The quintile system is allocated points from 5 to 1 where a school that is graded 5 is a school that has almost everything for example previous model C schools. A learner in such a school receives R25.00 per learner. Quintile 4 is R75.00, quintile 3 is R100.00 per learner, quintile 2 is R125.00 per learner and quintile 1 is a very poor school it is R175.00.

A school with one thousand learners under quintile three will receive R100 000.00 and the school with one hundred and thirty learners under the same quintile will receive R13 000.00. Suppose the schools are both in deep rural areas where they have to transport the learners, the educators and the school governing body (SGB) members to the Area Project Office (APO), which is situated $\pm$ 70 km away from schools, money allocated has to cater for the following:

- To buy daily operational consumables;
- To buy and maintain physical resources;
- For minor repairs maintenance of machines building and the fence;
- To attend workshops
- To fetch materials, circulars and submit information needed at the APO;
- To buy Learner Teacher Support Materials (LTSM); and
- To partially and conditionally exempt learners.

In October 1998 The Minister of Education, after consultation with the Council of Education Ministers, the Financial and Fiscal Commission and the Minister of Finance, gave notice in terms of section 35 of the South African Schools Act, 1997 of the norms

and standards for school funding. These norms became national policy on 1 April 1999 and will apply uniformly in all provinces. It is aimed at achieving equity in the distribution of resources (www.southafrican.info).

2.3.1.2 The educational context of South Africa

According to Brown, (2007:3) educational context of South Africa is a two way system influenced by the historical legacy of apartheid. Structurally, schools, universities and technikons in South Africa differ greatly in terms of quality, financial resources, ethos and size. The inequality is most evident in the condition of the infrastructures. Small schools are built in rural areas, in urban high schools bare hallways housing 1000 learners and only 20 staff members are common and privileged suburban white schools housing 400 learners and with over 20 staff members. Emphasis is on physical conditions as opposed to social indicators. The education department have merged the race groups together, mixing disadvantaged with advantaged learners to become model for change the reality is that most schools in South Africa remain segregated and unequal. Black, Coloured and Indian learners are expected to accommodate the values, needs and aspirations of white learners.



2.3.1.3 Inequitable funding practices

Education expenditure in South Africa is the largest budgetary item at least 20% of the total budget. Financial issues in the education context of South Africa involve the collection of school fees, the influence of parental choice, and the reality of inequitable funding. The government provides financial aid to all public schools but it is more in the form of horizontal equity ("the equal treatment of equals") rather than vertical equity ("the unequal, but equitable, treatment of unequal"). Addressing the issue of inadequate governmental resource redress allows the former Model C schools to charge school fees which vary considerably depending on factors amongst others such as class size, facilities and quality of teaching offered. A call for vertical equity is needed to recognize that different groups have different starting point and require different treatment. For

example support should be directed to currently under-resourced provinces. Areas with low economic activity should be granted additional funds to develop suitable infrastructure and promote educational opportunities (Brown, 2007:6)

2.3.1.4 Schooling inequality and the impact of the government

All provinces provide for universal and free public attendance at least through grade twelve and most require school attendance at least through age sixteen. The government moves to desegregate schools and to promote equal opportunity by race has been the largest intervention of the past decade. The courts have influenced the amount of racial mixing within and across the schools provinces. Most of the incidences were unraveled by courts because parents could not exercise tolerance. After 1994 the previous model C schools admitted learners of other racial groups. The transition was a difficult one to both the learners and educators' point of view some incidents were decided by the courts for example where a black or white learner was called by a derogative name.

The difference in spending across the provinces is the largest component of inequality in the resources available to learners. It is interesting that, while the national government has focused on purely distributional issues in terms of disadvantaged populations, there is little equalization of overall spending across the provinces. National spending has done little to disturb existing spending differentials across provinces, even though this large variation in spending is inversely related to the education and income of the government. Variety of programmes and financing incentives are designed to promote more equality in schools (www.southafrican.info).

Evidence on class size

In South Africa teacher pupil ratio in secondary schools is 1:30 and in primary schools is 1:40. The teacher pupil ratio in US concentrates on small classes and large classes where in small classes the ratio is 1:13 – 17 students and in large classes the ratio is 1:21 – 25 students. Spending per student has grown dramatically over the years. The pupil teacher ratio indicates the intensity with which school and classroom resources are applied to

student's education; the greater the intensity translates directly into greater spending (Rivkin, 2007: 4).

2.3.1.5 Education in provinces

From the School Register of Needs Survey 1996 the database shows that: Problems faced by provinces (Adapted from <http://www.education.pwv.gov.za>)

In the Northern Province 33% of existing buildings are in poor conditions. Three provinces, namely Eastern Cape, KwaZulu - Natal and the Northern Province had high class room shortages. The Free State was the province with the most farm schools, of the estimated 5 400 farms schools in South Africa; the Free State has 1 917 farm schools ten agricultural schools and 64 intermediate schools. Preliminary enrolment figures shows that there were 11 921 948 learners in South Africa in Public Schools (Grade 1 – 12) in 1998. In the same year approximately 360 725 educators were employed. In 1998/99 R73million was budgeted for national school building programme. The current South African education system accommodates more than 12,5 million learners. Formal education is categorised into levels, pre primary, primary, secondary and higher education.

- Pre primary education

Pre primary education is for children from the age of three years to school going age. Pre primary schools are registered with local authorities and their activities are controlled by various provincial departments.

- Primary schools

Learners enrol for junior primary education at the beginning of the year in which they turn seven years of age.

- Secondary schools/Further Education and Training (FET)

After the completion of the compulsory phase of education in Grade nine learners enter the FET band. At the end of Grade twelve (the senior secondary phase), learners write public examinations on a minimum of six subjects to obtain a senior certificate.

But with all these levels of formal education the government only funds education from the primary phase to the senior phase, from Grade one up to Grade nine.

According to a document produced by Siyakhula Trust (1994) free education means that the government has to ensure that every child has the right to go to school and be concerned about the quality of teaching. The government's aim is teacher – learner ratio one teacher for every 40 learners for primary schools and 1:35 for secondary schools.

Free education also caters for:

- The building of classrooms;
- The purchasing of classroom furniture;
- The purchasing of school equipment;
- The purchasing text books and stationery;
- The training of teachers; and
- The payment of teacher salaries.

The government is also committed to allocating the same amount of money to all the schools depending on the enrolment of learners. The government did not make provision for the schools with low enrolment as a result this research has to be conducted to address the problems encountered by small schools. The Provincial's Departments of Education have to work with a fixed budget which is allocated on annual basis by the national Department of Education. The money is divided amongst the nine provinces according to the need and the number of schools- going learners. The provincial minister of education is responsible for distributing the money to the different schools in the province. This allocation is made according to a fixed formula i.e. so much money per learner per

school. The allocation of money is never enough to satisfy the needs of the school (www.education.pwv.gov.za).

2.3.1.6 Parental contribution

The school governing body (SGB) is expected to augment the money the school receives from the department education, one way of doing this is through parental contribution. The School Act allows provision for payment of school fees by parents, but a resolution to do so has to be adopted by a majority of parents at a parents meeting. The resolution also must state a criterion of how parents who are unable to pay the specified fee can be exempted from paying the total or part of the school fees.

The government insists that no child must stay away from school because his or her parents cannot afford to pay the school fees. However without the additional money the running of the school will not improve for example the school may not have the following physical resources photocopier, computers and enough learner materials and the quality of education will be compromised. Income in schools can come from the various sources:

- Government funding;
- Parental fee revenue;
- Community;
- Sponsoring organisations and companies;
- Other examples can be renting out of school premises after hours; and
- Fundraising;

2.3.1.7 No fee schools

The national minister of education on 31 August 2006 announced that quintile 1 and 2 schools, which are 40% of the public school learners nationally, may not charge school fees in 2007. The member of the executive council in a province has to identify specific schools in the province. Those schools will be no fee schools as contemplated in section

39(9) of the South African School Act, Act 84 of 1996. The break down of the 40% per province learners in national quintiles 1 and 2 for 2007 is given in Table 2.2.

Table 2.2 National quintiles

National Quintiles			
Province	Quintile 1	Quintile 2	Total percentages of learners in no fee schools in 2007
Eastern Cape	34,85	21,58	56,43
Free State	30,83	14,90	45,73
Gauteng	10,46	11,44	21,90
Kwa Zulu Natal	24,19	18,76	42,95
Limpopo	33,96	22,34	56,30
Mpumalanga	16,68	20,17	36,85
Northern Cape	26,28	17,69	43,97
North West	22,70	15,24	37,94
Western Cape	6,54	8,02	14,56

Adapted from (www.polity.gov.za) 19/10/06

The government has added extra funding for impoverished schools; schools which are in quintile one and two. Provinces are allotted money according to the number of schools under quintile one and quintile two, which are named no fee schools. According to the Table 2.2 the North West Province has 37.94% of learners in no fee schools in 2007. The No fee came into being in 2006 only 20% of schools were allocated the fee. In August 2006, 7687 schools, with 2 556 550 learners had chosen to become no-fee schools an increase of about 40% in 2007. The introduction of the no fee schools had become a reality in 2007. The poor schools were earmarked as schools in which parents did not have to pay school fees. The schools fall in quintile one and two categories. Research conducted in KwaZulu-Natal had found that only 20% and 30% of parents at these schools could afford to pay schools fees, varying from R100.00, R120.00 and R150.00 per child annually. The schools that applied for no fees would mean that parents would not be required to pay school fees. To enable schools to operate the department of education replaced money contributed by parents at those schools by increasing the allocation per learner to R569.00. The new allocation was R42.00 higher than the benchmark, set by the national minister of education. Schools benefited from that allocation for example a school that received an allocation of R176 750 for learner basic education and learner support material in 2005. In the no fee dispensation the school

received R197 637, received R20 887 more ([www.schoolmanagement.blogspot 16/06/2007](http://www.schoolmanagement.blogspot.com/2007/06/16/06/2007)). The process of phasing in the implementation plan for the no fee schools will be completed in 2007/08 financial year. The national target for the no fee school is currently R772 per learner. In the North West department of education 37.6% of all of the poorest learners will receive an increased norms and standards allocation in 2008. The department of North West in 2008 intends to move to the national target currently set at R772 per learner for the poorest quintile, first quintile 6.5% learners, R711, the second poorest quintile 8% of learners and R581 per learner, the third poorest quintile 23,1% of learners (Kassiem: 2006: 7 www.pmg.org.za 18/12/07).

2.3.1.8 Problems of no fee schools



The government's no fee policy school had problems; schools found that they were even poorer in January 2007. There were legislative delays some schools have not yet received their allocations from the provincial education department or have received less than the fee expected (Macfarlane, 2007: 3 www.mg.co.za/article 18/12/07).

2.4 SCHOOL FUNDING IN DEVELOPING AND DEVELOPED COUNTRIES

Financing of education is one of the most important factors in the development of a national education system. Education is a tool which benefits the economy of a country. The financing of education is significant in any country, but even more so in a developing country. One of the best ways of measuring the quality of a country's education is by looking at the duration of compulsory schooling and the manner in which it is funded (Dekker, et al., 1996: 48).

The following discussion focuses on how other countries finance basic education and the mechanisms used to distribute the funds evenly among schools or provinces. The discussion will include the following countries. England, USA, Germany, Russia, China, Japan and Kenya.

2.4.1 FINANCING OF SCHOOLS IN ENGLAND

2.4.1.1 Local management of schools: the legislative framework

The broad aim of the legislation was to increase local responsibility for running schools without changing the total resource allocated by Local Educational Authorities (LEA) to increase the quality of education by more efficient use of resources. The Local management of schools (LMS) process has two main components first the allocation of a school budget and the allocation of resources. The allocation is calculated according to a predetermined formula based on the age profile and numbers of pupils attending a school. The second part of LMS is the transfer of control over the spending of the budget.

2.4.1.2 The construction and management of formula funding in three local education authorities

The first profile of the local education authorities is a smallest of the 36 metropolitan districts in England.

2.4.1.3 Constructing the funding formula in the first district

In the secondary schools the curriculum-led staffing model was used to create an algorithm to identify how much money should be allocated to each pupil. In the case of primary schools no such model existed the algorithm was based on the personal convictions of the education advisers in the LEA as to what was acceptable or to derive two proxies for the specific needs of different pupils in particular areas: one for social deprivation and the other for different learning abilities. The proxies were subjective and problematic (Edwards et al, 2007:9).

The second profile of the local education authorities is a densely populated metropolitan district. In this district the pupil teacher ratios were converted into monetary units to determine the amounts of money to be allocated. The entire number of pupils on the roll and budget were divided to get the rate per unit which was then multiplied by the number of units to arrive at the budgeted figure.

The third profile of the local education authorities is one of 39 English counties with a population of almost a million people. It is densely populated and contains both rural areas with small isolated schools and large urban areas. In these counties a differentiated allocation of lump sums allowances was given to individual schools and the larger the school the higher the allowance (Edwards et al, 2007:11).

In England educational finances were considered to be mainly a local affair, although this has changed in recent years with the development of grant-maintained (GM) schools (www.direct.gov.uk). All five to six year olds receive free education. Capital expenditure is covered by a block grant received by the Local Educational Authorities (LEA) from the central government. This has to cover education, health services and other local services. LEAs decide how large a portion of the grant should go towards financing education including furniture, equipment apparatus and construction costs (Dekker and Van Schalk Wyk 1996: 212). Based on 1996 figures the total Department of Education and the LEA expenditure on education was divided as follows (Dekker and Van Schalk Wyk *ibid* 1996: 212):

- Schools 61%;
- Higher education 29%;
- Research council 4%;
- Administration 5,7%; and
- Spending per pupil averages £1 200.

Since the development of grant maintained (GM) schools, there has been an increase annually. The central government spending on GM schools has increased from £204million in 2005/06 to £589million in 2007/08 (Shabba and Orr 2007:7).

There are authors who examined the main benefits and pitfalls of facilities management as applied to grant maintained schools. They addressed a number of questions such as the desirability of the method as applied to GM schools. They wanted to ascertain on what assumptions have the GM school model been based. The financial implications of the GM schools are as follows:

- The degeneration of school buildings resulting to lack of funds;
- The cost of operation is constantly under pressure;
- The trend is to allocate resources to users' departments only when appropriate;
- An analysis of cost-benefit equation is necessary to ensure optimal spending and value for money; and
- The central government effectively controls what councils are able to spend.

The council income is raised from the government in the form of revenue support grant, a share of the uniform business rates and the local council tax. The GM schools Manston Green School in Aston and Hyrstmount School at Batley, at West Yorkshire have been built embodying the same design as that which characterised the Nelson Mandela School built in Birmingham. These schools reflect the main principle of locally managed schools and enjoy semi- independent status from the local education authority by encouraging community participation, direct responsibility of the school for its own budget and the cost of repairing vandalism (Edwards et al, 2007:18).

2.4.1.4 Common Funding

In April 2005 a new system of funding scheme was introduced by the state which provides funding to all grant maintained schools. It replaces the seven separate Local Management of Schools (LMS) schemes, which previously distributed funds to schools. The common funding schemes allow the schools to have access to centre services and resources for specified purposes (www.deni.gov.uk). For example Table 2.3 shows the allocation for Belfast schools.

Table 2.3 Allocation of Belfast schools:

School Reference Number	School Type	School Name	Total funding allocated 2005/06 (Including transition)
123-0053	Secondary school	St Louise Comprehensive College	£ 7,055,974
113-6349	Nursery school	Matt Talbot Nursery	£ 143,163
111-6074	Nursery school	Glendhu Nursery	£ 79,014
141-0079	Grammar school	Grosvenor Grammar School	£3, 728,284
101-0231	Primary school	Strand Town Primary	£1,830,598
101-0012	Infant school	Belmont Primary	£ 522,940

Adapted from (www.deni.gov.uk)

Common school fund value as of June 30, 2007 amounts to \$1, 169,000,000. Others sources of money contributing to the common school fund include:

- Escheat property reverting to the state on an individual's death because no heir or well exist can be found;
- Unclaimed property, while the agency searches for the rightful owner;
- Gifts to the state not designated for some other purposes;
- Tax revenues from the production, storage, use, sale or distribution of oil and natural gas; and
- Five percent of the proceeds from the sale of federal lands.

Table 2.4 Common school funds distribution from the year 2000 to 2007 amount in millions

2000	2001	2002	2003	2004	2005	2006	2007
35,2	40,8	15,7	32,3	13,3	40,2	45,2	48,5

(www.schoolfund.co.uk).

Distribution of funds to schools has increased over the years but it is still a concern because small schools, some schools in rural areas (experience decline in enrolment) are not funded according to their needs. The government has to at least fund basic education.

2.4.2 FINANCING OF SCHOOLS IN USA

The United States of America is divided into different States each state provides a free public school system which starts at kindergarten and includes 12 years of education (www.ode.state). Education is compulsory from the age of six or seven to the age of 16. The increase in expenses precipitated a financial crisis in education. The local authorities could not afford to finance education on their own. This led to a change in the role of the three main financial providers – the local, state and federal authorities. The state took more responsibility in funding schools compared to other financial providers. In 1980/81 an average of 43,3% of the total income of local authorities was allocated to education. However, since the late 80s the annual cost per pupil has tripled because of:

- Large scale expansion and improvement of educational programmes and schools services;
- Increase in teachers' salaries; and
- Inflation (www.southafrican.newyork.net/consulate/education).

Van Schalkwyk (ibid) states that the increase in education expenditure placed a heavy financial burden on local communities. As a result richer districts could afford better facilities than poorer districts, this created problems hence the political and economic realities played a major role in diminishing local influence in public education increase state influence to maintain the principle of equal education opportunities. Local authorities remained responsible for education but the state remained legally responsible for education. The state gave local authorities financial support. In 1980/81 the state spent 47,4% of their income on education (Van Schalkwyk, 1996: 412).

The complicated distribution of state funds in education is determined by the number of children attending schools in different school regions and allocation varies from state to state. To provide all pupils with equal educational opportunities, the state gives more assistance to poor districts than to rich ones (Van Schalkwyk, 1996: 413).

2.4.2.1 Elementary and secondary schools

Public elementary and secondary schools receive their revenues from the government, state or local districts. Per pupil expenditures varied greatly among the states in 1989/90. Alaska received \$8,374 and Utah received \$2,730 most states ranging from \$ 4000 to \$6000. These differences reflect cost of living differences and the relative economic bases from which states can derive income. In 2007/08 the expenditure still varied greatly Alaska received \$20 478, Utah received \$13 453 most states ranged from \$12 000 to \$1million. Per pupil expenditure had increased over the years but there are still schools who receive low allocation depending on the rich or poor area (DoE USA).

In US provision is made for disadvantaged pupils the programme is referred to as “Chapter one”. The programme provides compensatory education services for about five million disadvantaged elementary and secondary school students. These funds assist the disadvantaged children to acquire basic skills.

Another programme is for children with disabilities which provide services to four million children in elementary and secondary schools. The goal is to ensure that all such children acquire basic academic skills to participate fully in the society. The grant programme is referred to as “Chapter 2” and it is part of the education consolidation and Improvement Act of 1981 improved in 2007. It provides aid to states to improve the quality of education for all children.

2.4.2.2 Funding and distribution



Oregon school finance system that the legislature passed on in 2005 regular session. The system is for the K-12 school districts (students in Grade K-12) and Education Service Districts (ESDs). The districts and the ESDs are primarily funded through the State School Fund, but also include other funds. School finance legislation in the 2005 regular session focused on three issues:

- The level of state school funding;
- Continuing the equalization of high cost special education expenses; and

- The funding and structure of ESDs.

The legislature adopted a school finance of \$5,24billion with an additional potential of \$23million. The legislature maintained the following issues:

- A high cost disability grant component;
- Additional funding for small high schools; and
- Small districts with small high school continued extra funding per high school student (www.leg.state.or.us).

Attempts to change the K-12 equalization formula to benefit rural, declining enrolment and high growth district were unsuccessful. K-12 schools are virtual schools, small high schools, state special education and school equalization formula. ESDs role is to assist component schools districts using equalization formula. The virtual district is exempted from statutes and rules applicable to other school districts unless specifically included. The virtual district is also not eligible for formula revenue from the State School Fund. K-12 equalization formula includes local revenue mostly from property taxes, taxes paid the previous year, Common School Fund, County School Fund and the state managed county timber trust land and other minor sources. The source for ESDs is local revenue in the form of property taxes collected by the districts and the other minor source is revenue from the state managed county timber trust land distributed to districts (www.leg.state.or.us).

2.4.2.3 State school fund allocation

The allocation of the state school fund depends on local revenue estimates. The local revenue estimates are divided between ESDs and school districts. The ESDs share 4,4% and the school districts share 95,2%. The district equalization grant is distributed in this manner: the grant is equal to the number of students multiply the local option tax rates multiply the difference between the target value per student.

Table 2.5 K-12 equalization formula

District formula revenue		General purpose grant		Transportation grant
State School + local Fund revenue	=	Student (ADMw) x \$4,500 adjusted by teacher experience and balance to available \$	+	70%-90% of transportation costs
	+	High cost district grant	+	Facility grant
		Up to sum of costs above \$30,000 per disability student		Up to 8% of construction costs

ESD equalization

Allocation formula

Base revenue	=	4.99%	x	sum of component school district revenue
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$$4.99 \times 95\% = 4.75\%$$

State and local revenue	+	Percent to balance	x	Higher of (1) base revenue (2) \$1 million
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The state school fund is equal to zero if an ESD's revenue is greater than its general serious revenue. An excess in local revenue is distributed proportionally to weighted average daily membership (ADMw) and is included as local revenue to schools in the school formula the following year (www.leg.state.or.us).

2.4.2.4 Charter schools

Parents in America have a choice of enrolling their children in public elementary, secondary and charter schools. The charter programme was introduced in 1995. The aim was to improve performance especially in mathematics and reading. The opening of charter schools could push regular public school to improve performance. In just ten years of development they are found in over three fourth of the states and their enrolment exceeds four percent of the public school population in some states. Charter schools are funded by the state and local government. Parents pay for their children's lunch; parents

with low income are eligible for subsidised lunch. Most charter schools are found in Texas. The Texas education code established three types of charter schools:

- Home rule school districts;
- Campus or programme charters; and
- Open enrolment schools.

Open enrolment schools receive their charter directly from the state, campus and programme charters receive their charters from the local districts. Open enrolment charter are the largest governed by the State Board of Education. Charter schools are largely attended by Black student (www.census.gov). Charter schools are exempt from many of the state and local regulations that school reformers have argued stifle innovation and reduce the effectiveness of public schools (Nathan, 1996: 113).

2.4.3 FINANCING OF SCHOOLS IN GERMANY

The German education system including the universities is free of charge to bona fide expatriates. The catch is that the classes are conducted in German. The kindergarten is optional provided for all children between three and six years old. School attendance is compulsory for ten to thirteen years. Home school is permitted if it is performed by a qualified educator. Primary schooling starts at the age of six from grade one to grade four is elementary school. The school is called Grundschule. From the fifth grade children choose to attend different schools that is Hauptschule which is from grade five to grade nine or Realschule is from grade five to grade ten or Gymnasium is from grade five to grade thirteen (www.german.culture.com.na). The secondary school includes four types of schools based on a pupil's ability. Gymnasium includes the most gifted children and prepares students for university studies; the Realschule emphasizes a broader range for intermediary students; the Hauptschule prepares pupils for vocational education and the Gesamtschule or comprehensive school combines the three approaches. In order to enter university, high school students are required to take the Abitur examination diploma; students who have a vocational diploma may apply for university entrance.

A special system of apprenticeship called Duale Ausbildung allows pupils in vocational training to learn in a company as well as in a state run school (www.wikipedia.org/wiki/ed-u-germany accessed on 16/06/2007).

In Germany there are many international schools which cater for parents who do not send their children to government schools. The schools are very expensive, the cost is very high it is $\pm$ € 11,000 per high school per year. Pre - school and elementary school grades cost 30% to 50% less. There are additional costs such as transportation, lunches, class trips and various special activities (wwwwtogermany.com). Education in Germany is the responsibility of the parents and most parents enrol their children at international schools. The following discussion focuses on the Independent Bonn International School, International School Bremen and Frankfurt International School are discussed here (wwwwtogermany.com).

- **The Independent Bonn International School**



This school provides education for children aged three to eleven years. The school has an active parent - teacher association (PTA) which organises numerous events, fund raising, runs the school uniform shop, a parent book library, provides room mothers and help advice for new families. This has contributed to fostering excellent relationships between all parts of the school community (www.bis.bonn.org).

- **International School Bremen**

Bremen was founded in 1998 to serve the educational needs of families from other countries and it has three pre-school grades. The school has introduced an American high school diploma. The Middle States Association accredited the school in November 2004. Students range from age three to the age of fifteen coming from different countries. Teachers are from United States, Germany, Scotland, Australia and Russia (www.isbremen.de).

- **Frankfurt International School**

The school was founded in 1961 it is the largest international school in Germany. The student population is 1,700 from more than 50 countries, employs 296 faculty staff from 28 countries and all teachers have bachelor's degree or its equivalent (www.fis.edu). It is evident that education in German is paid for by parents the government only spends for education for German citizens or foreigners who are interested in learning in the German language.

2.4.4 FINANCING OF SCHOOLS IN RUSSIA

Since the October revolution of 1917 education in Russia has been free and compulsory. The school starting age is from six years. Primary or elementary school phase ends at the age of nine. It is the first four years of formal education grade one to grade four. Lower or incomplete secondary school starts from grade five to grade nine, ages 10 to 14 years. Compulsory schooling lasts for nine years. Upper or complete secondary school adds another two years to the lower secondary school grades 10 to 11 ages 15 to 16. There are three types of institution that offer courses at this level: the general academic schools, the secondary vocational-technical schools and the specialised technical schools.

Up to 1980 financing of education was strictly centralized. The formation of the common wealth of independent states has changed the pattern of financing so that each state is currently responsible for its own budget (Van Schalkwyk 1996:262). In 1990 the Russian Federation State budget allocated 3,9% of the public national income to education. (Approximately 15 billion rubles, excluding investments). The sum total of expenditure for, all sources was 33,4 billion rubles. Resources were allocated as follows: (Eklof and Dueprov 1993: 151):

- | | |
|------------------------------------|--------|
| • Pre schools | 14,7%; |
| • General educational institutions | 51,7%; |

- Boarding establishments 8,2%;
- Extra mural activities 4,4%;
- Vocational Training Institutions 15,8%;
- Specialised secondary schools 2,3%; and
- Higher specialized secondary schools 2,9%.

Attempts are made to secure some private money for education there is an increasing number of private enterprises and companies that are prepared to spend some money on education (Van Schalkwyk, 1996: 262).

2.4.5 FINANCING OF SCHOOLS CHINA

The vastness of the country has caused formidable problems with regard to effective provision and administration of education for a population of 500million children and young adults. Financing of education in China is centralized and decentralization funding. Education is financed by the state and the local government, and is further subsidised by rural people's communes and production brigades. Schools earn part of their income themselves; parents make a contribution in the form of fees. Parents pay school fees for primary and secondary schooling, and it is estimated that 35% of the children in rural areas do not complete their primary schooling because their parents cannot afford to pay for text books, supplies and workbooks (Dekker and Van Schalkwyk, 1996: 308).

Henze (2004:145) states that additional demands have been placed on businesses and individuals as village and township enterprises have to pay an education tax certain times of each year. The author further states that cities supporting funds for education obtain funds from a manufacturing tax, appreciation tax and business tax. New policies for funding have also affected students, parents and teachers in that they have to contribute to collections to raise school funds. Henze *ibid* states that in many places school buildings have actually been closed because of lack of funds necessary for the upkeep of physical facilities. As a result of the policy of decentralising funding, education has become very

expensive for many people. At the central government level there is a reluctance to invest in school education (Lin, 2001: 83).

China's Seven Five Year Plan was introduced which addresses:

- Basic Education

Reform aims at the introduction of nine years compulsory basic education. The vastness of the country, the distribution of the population, the disparities between rural and urban areas, the provision of basic education are to be carried out according to the needs and developmental levels of three types of areas. Large cities are where the implementation of universal primary education was scheduled for 1990 while for semi developed towns there target was 1995. Economically developed rural areas development depends on local resources (Dekker and Van Schalkwyk 1996: 309).

- Vocational and technical education

There are two streams after basic education offered by regular senior middle schools and vocational and technical high schools. In rural areas a successful attempt to provide relevant education for peasant farmers had been introduced where funding was from local agricultural proceeds. Private enterprises were encouraged to establish vocational and technical schools (Van Schalkwyk, 1996:309). Schooling in China takes five years of primary schooling three years of junior middle schooling and two years of senior middle schooling (Van Schalkwyk, 1996: 295).

2.4.6 FINANCING OF SCHOOLS IN JAPAN

Japan is successful in education due to the readiness with which the parents and the government finance education. Money for funding education is drawn from taxes, loans and income from property owned at a national prefectural and municipal level. Compulsory education from six to 15 years is free in terms of a basic legal principle, parents usually cover a fair amount of the expenses of elementary, lower secondary and full-time upper secondary education. These contributions are used for meals at school, transportation and extra teaching equipment.

Elementary education is generally financed from local funds while secondary and advanced education is funded from national and prefectural sources. Contributions from state funds are spent almost exclusively on compulsory and higher education, with only a portion being given to national museums, art galleries, research institutes or private schools. Prefectural funds, including government subsidies, are used for libraries, prefectural upper secondary schools, specialised education for handicapped pupils and municipal schools from preprimary to lower levels. The prefectural funds, teachers' salaries and the municipal authorities are responsible for carrying a large proportion of the costs involved in compulsory and upper secondary education. Municipal authorities provide funds for municipal schools, special teaching facilities (Van Schalkwyk, 1996: 361). Children between ages of six to fifteen undergo elementary training for a period of six years and lower secondary training for a period of three years. Compulsory education is free but this does not include meals, excursions, medical care. The Japanese use the term primary education for elementary or basic education. Primary education classes are from grade one to grade six. Lower secondary education is from grade seven to grade nine for twelve to fourteen year olds. The emphasis is on academic instruction. Upper secondary is neither free and nor compulsory but it can take a vocation orientated or an academic direction (Van Schalkwyk, *ibid* 1996: 353).

2.4.7 FINANCING OF SCHOOLS IN KENYA

In Kenya free voluntary education has been provided at primary schools since 1980 (Nkinyangi, 2004: 199). In the mid 1980s the government stopped financial assistance to primary schools, except payment of teachers and school supervision. The Kenya school equipment scheme was disbanded and the responsibility of providing teaching and learning facilities was passed on to parents, as a result, Kenyan primary schools have a weak financial base (Munene, 1999:5). In 1980 the state commenced with cutting down on funding for secondary and hostel accommodation for pupils in order to reconcile the growing demand for secondary education and the shortage of funds. The state reversed its decision to support Harambee schools, which are heavily dependent on parents' contributions, and provided the school with a principal and two teachers for all the schools (Olembo, 2000:371). As a result, parents have to make enormous sacrifice to keep their children at school.



Olembo (2000:369) points out that in 1972 15% of the vocational budget was allocated to education and more than 30% in 1983. In contrast, currently only 19,8% of the state budget is set aside for education. To illustrate the extent of parents' contributions, it can be pointed out that 60% of all secondary pupils study at Harambee schools and that 75% of all secondary schools are Harambee Schools (Van Schalkwyk, 1996: 395).

2.4.8 FINANCING OF SCHOOLS ACCORDING TO THE WORLD BANK REPORT

There are different fees that private households have to pay for primary education, such as tuition fees, text - book fee, rental payments, compulsory uniforms, Parent Teacher Associations (PTA) dues and special fees like examination fees contributions. Private tutoring also adds up to the household cost of primary education (Kattan & Burnet, 2004:5). Fees that are excluded in most cases are fees that are not to do with education but with the child's welfare such as boarding and lodging charges at boarding school and charges for school meals. Other additional costs to primary education can be transport costs in sending children to school. According to Kattan et al., (2004:6) transport costs in

Cambodia take up 21% of households spending on primary education and also in many countries children are sent to private tutors outside school hours though not compulsory, such fees add to the costs of primary education.

2.4.8.1 Abolishment of fees at primary level

School fees are a serious obstacle to enrolment and completion of schools for millions of children around the world. For example surges in countries like Uganda and Timor caused the government to eliminate school fees. The World Bank supports the elimination of fees in Africa but not at the expense of quality education. If fees are reduced or abolished there is a need to ensure replacement of fees with revenues that will equal the total school expenditure (Kattan et al., 2004:5).

Four countries, Malawi, Uganda, Tanzania and Kenya abolished fees at the primary level of education, suggesting that payment of fees is a major obstacle to enrolment in Africa. This led to dramatic results. Malawi abolished fees in 1994 and enrolment increased to 57%, Uganda removed fees in 1996 and experienced a 70% increase in enrolment. In 2001 Tanzania dissolved fees which resulted in a rapid increase from 57% to 85% by 2002. The elimination of fees in Kenya resulted in 1.2 million additional students even older people entering the school system. The situation in Malawi was extreme in that the increase in enrolment resulted in the following ratios:

- Pupils: classroom 119:1;
- Pupils: desks 38:1;
- Pupils: chair 48:1;
- Pupils: textbooks 24:1; and
- Pupils: teacher ratio 62:1 Kattan et al (ibid).

These consequences affected the quality of education in Malawi since planning was not done before elimination of fees.

In Tanzania the abolition of fees was less severe in the deterioration of quality of education because the government helped to close the financing gap (Kattan et al 2004: 9). According to Kattan et al (ibid 2004:5) there are four principal sources of such replacement of revenue:

- “Countries may increase expenditure on education by switching spending from other sectors or by increasing revenues.
- Improving the efficiency of education spending, particularly the balance between different educational levels and the balance between salaries and other expenditures. Expenditure shifts do take time, however and must be well prepared politically, sometimes being as difficult to implement as the introduction or augmentation of fees.
- Using Heavily Indebted Poor Countries (HIPC) debt relief funds on a temporary basis to close the financing gap in many heavily indebted countries over the next few years.
- Using funds from the Fast Track Initiative (FTI) Catalytic Fund on a temporary basis represents an extraordinary opportunity to provide temporary financing to FTI countries working towards the elimination of fees.”

Based on the review by Kattan et al (2004:5) paper recommends that the World Bank should:

- Develop an explicit policy on user fees based on the premise that no child should be excluded from primary education on the basis of inability to pay and work actively with governments to find alternatives to existing user fee programs, focusing mainly on the replacement of lost revenues from fees.
- ‘Develop clearer and shorter public policy statements on user fees in primary education.
- Review the determinants of enrolment in all countries that are unlikely to achieve the education Millennium Development Goals.

- Examine the effectiveness and impact of textbook charging schemes it has supported and clarify its position.
- Analyse the effectiveness of targeted fee waiver schemes in primary education.’

2.4.9 Higher education financing and equality of educational opportunities in Swaziland

The government in Swaziland contribute about 83% of the total fund in the tertiary level, the household and the family’s contribution is higher at the primary, secondary level and high school levels. Higher education is heavily subsidised by the government at the expense of basic education. This brings about inequality of educational opportunities within the education system. To redress the imbalance in funding mechanism, cost sharing measures are being proposed at the higher education level. The association for the Development of education in Africa (ADEA) highlights the following important roles of higher education in a developing country:

- To prepare the much needed resource base to fill, high-level scientific technical, professional and managerial jobs in the public and private sectors;
- To generate knowledge and innovation needed for national development through indigenous scientific research;
- To be agent for acquisition, adaptation and dissemination of scientific and technical knowledge developed to populace;
- To provide necessary community devices needed for development in both the public and private sectors;
- To be sources of analytical perspectives on social problem and their possible solutions that are independent of political and religious authorities; and
- To encourage indigenous self-expression, conserve and adopt local traditions and values (Akinkugbe, 2007: 14).

Realising these roles most countries in the Sub-Saharan Africa (SSA) undertook a major change: the government assumed responsibility for the financing of education. The main reason for this is to ensure accessibility, efficiency and equality of educational opportunity amongst all citizens (Akinkugbe, 2007: 16).

Swaziland education sector reviewed and analysed their financial flows. They made a distinction between recurrent and capital cost spending, between types of recurrent spending as well as between sources of financing of education. The estimation of the unit costs in the education system resulted in using two complementary but different approaches the macro and the micro approaches. Using the macro approach, unit costs are obtained by aggregating the amount spent on education by all the contributors and then dividing the result by the number of learners. The micro approach on the other hand is based on the fact that unit costs reflect the composite cost of distinct inputs in education. Thus goods and services for the learners are decomposed into items that can be costed independently, such as welfare, educators' time and pedagogical materials (Akinkugbe, 2007: 22).



The financing of public education in Swaziland the high proportion of education expenditure is from the central government budget other sources of financing from local communities, families and individual, non-governmental organisations, private enterprises and corporations as well as foreign aid. In Swaziland education system in primary, secondary/high school fees are paid; in tertiary/higher education students pay only late registration and supplementary examinations fees which are quite little when compared to costs. This is because most student sponsored by companies and organisations are on government scholarship. On average about 30% of the recurrent expenditure is used on primary education and the remaining 70% is divided equally between secondary and tertiary education (Akinkugbe, 2007: 32)).

2.5 Constraints on the effectiveness of schools and their principals

The following are some of the constraints on leadership effectiveness:

- Inadequate funding;
- Time taken in dealing with problem learners;
- Lack of time for supervising staff;
- Lack of staff mobility; and

- Amount of time required for management tasks and details.

2.5.1 Financial constraints

There is a concern about the inadequate finances at all levels local, provincial and federal. The economic situation has created a shortage of funds and a reduction of funds throughout Canada and other parts of the world. Education has faced major financial problems when international comparison demand an increased focus on excellence (Smith et al., 2007: 3).

The principal of a school with 400 - 499 learners in a large urban area mentioned that the largest restraint is the lack of funds to provide programmes beyond the basic needs. He accessed fees did fundraising which augmented the meagre allocation from the province. A principal in a small rural school of fewer than 200 learners maintained that allocation allow little innovation, purchasing technological equipment and hiring of newly trained staff create constraints on school and leadership effectiveness. Principals discussed strategies such as fundraising ventures, connections with private industry, community agencies and governmental departments to meet the needs of adolescent technological equipment, work-experience programmes, career training, stay – in – school initiatives and personal/family counselling. It is evident that the role for principals have become complex in this decade through budget management requirements, human resource management and have to mentor the staff and hold numerous workshops to develop the staff (Smith et al., 2007: 6).

2.5.2 Problems in public schools

Public opinion generally supports the notion that public schools face problems. Common views supported are that the government has to fund schools since there is increasingly more poverty experienced through unemployment. Other hold that support for schools has fallen; pressures to lower taxes take precedence over schools, and older population has less interest in schooling; teachers or other personnel contribute to problems, it is

poor pay and lack of resources that make teaching undesirable occupation. Resources are the key to deal with some needs of the school (Smith et al., 2007: 24).

Every school is supported by three legs, teachers, learners and the buildings; what binds them together is money. Finance is the heart of any institution and if the school is to meet its objectives money is a vital resource. When funds are lacking it is difficult to run a functional school. The schools in South Africa depend mainly on allocations from the government, school fees, fund raising and donations from private sectors in the form of donations. The current poor funding of primary and secondary schools in South Africa has had an adverse effect on smooth running of the school providing services like teaching, library material, physical resources and human resources. However, funding for some schools has not always been in short supply (Smith et al., 2007: 23).

2.6 SUMMARY

This chapter has focused on the nature and scope of funding from developing and developed countries as well as the duration of the compulsory schooling and the manner in which it is funded. The chapter also focused on the investigation from where schools derive their funding. The concept school fund was also reviewed where it was concluded that it means all the money that the school has whether is from the government, the parents or the businesses. It is also evident that basic education from different countries is largely funded by the government and with little contribution from the parents and also stakeholders in education.

Financing of education in England was a local affair but due to increased demands it is currently largely financed by the government, thus grant maintained schools. In US the three main financial providers were the local, the state and the federal authorities but the increase in the education expenditure led to the state taking responsibility in financing schools and introducing programmes to finance disadvantaged children. Financing of education in Germany is free of charge for learners and students whose medium of instruction is German. Parents who want their children to be taught in any medium of instruction except German have to pay for the tuition of their children hence there are

many international schools in Germany. Financing of education in Russia is free for basic education. Education in China is largely the responsibility of the parents, business undertakings and the government. Japanese education is financed by parents and the government. In recent years education in Kenya is free, it is the responsibility of the government but the government is not meeting the increasing demands. The World Bank supports free education but the country introducing free education has to be able to meet the demands of education without compromising its quality.

CHAPTER THREE

3. RESEARCH METHODOLOGY

3.1 Introduction

The chapter reflects the gist of the method of research and data collection in this study. For any researcher to engage in a research study he or she has to explore what is known about the topic. This is done through questioning relevant people. The researcher can question people about various topics, including participants' attitudes, motivations, intentions and opinions, past events and expectations (Cooper and Schindler, 2003:319). The questioning technique includes questionnaires and communicating with participants or interviews.

3.2 Data collection instrument

In this research study, a questionnaire was used as the primary tool for data collection.

3.2.1 Questionnaire

Babbie (1998:167) states that a questionnaire consists of a list of present questions to which respondents are asked to supply answers. The author further states that researchers who use questionnaires regard them as a comparatively cheap, fast efficient method for obtaining large amount of quantifiable data on relatively large numbers of people.

According to Cooper and Schindler (2003:341) questionnaires cost less than personal interviews. Both Cooper & Schindler (2003: 341) and Brink (1997: 154) agree with Parahoo (1995: 247) that the questionnaire is one of the common methods of data collection in descriptive, correlation and experimental studies.

3.2.1.1 Advantages of a questionnaire

Although a questionnaire is regarded as the most reliable tool for data collection there are advantages and disadvantages attached to it. According to Babbie (1998:167), and Cooper and Schindler (2003) the following are advantages:

- A questionnaire is an inexpensive way to gather data, especially if respondents are dispersed over a wide area.
- A questionnaire is able to collect data at a low cost than interview and observation.
- Researchers can contact participants who might otherwise be inaccessible such as major corporate executives or physicians who are difficult to reach in person or by phone as gatekeepers, and secretaries limit access.
- Questionnaires are perceived as more impersonal, providing more anonymity than the other communications modes, including other methods for distributing self administered questionnaires.
- The inclusion of a stamped, return envelope encourages response because it simplifies questionnaire return.
- Questionnaires provide data which can be easily quantified. They are largely designed for this purpose.

3.2.1.2 Disadvantages of questionnaires

According to Legotlo and Teu (1998), Babbie (1998), Cooper and Schindler (2003) the following are the disadvantages of a questionnaire as a research instrument:

- Lack of proper instructions for completion may lead to non response to some of the questions;
- Mailing questionnaires to respondents can be expensive;
- The wrong person may open the envelope or receive and fail to pass it to the attention of the right person;

- A participant may find no convincing explanation for completing the questionnaire and discard it;
- A respondent may temporarily set the questionnaire aside and fail to complete it;
- Respondents may choose not to be genuine in answering the questions and choose to provide generally accepted answers; and
- There is no opportunity for the researcher to clarify misunderstood questions.

In this study the researcher delivered copies of the questionnaire to the respondents and collected them personally. In case where the respondents were inaccessible, questionnaires were left at one of the Zeerust APO staff member to distribute to principals and collect them. The distribution and collection of questionnaires went very well.

3.3 Designing a questionnaire

It is important for a researcher to produce a well designed questionnaire that will attract his or her respondents to fill easily. Cooper and Schindler (2003), Legotlo and Teu (1998) Parahoo (1997) argue that a good questionnaire is difficult to develop and it needs proper skills. They further mention that the following points should be borne in mind when designing a questionnaire:

- That the questionnaire should be in line with the aims of the study;
- That it should obtain the accurate information needed; and
- It should gather information within reach and within reasonable limits of time.

A questionnaire can work well for a researcher if well constructed and well administered. Babbie (1998), Legotlo and Teu (1998) caution the researcher to:

- List all issues to be investigated and the aims of the study;

- Have a thorough and relevant knowledge and understanding of related literature; and
- Formulate specific questions that are reasonably long, unambiguous and organised sequentially.

On the basis of the above information, the questionnaire for this study met the requirements and was firstly tested on a small group of respondents to find out if there was a need for improvement to check on spelling errors, repetition of items, if additional items were needed.

3.3.1 Question formats

Questions usually fall into the following categories open ended questions and closed ended questions.

- Open ended questions

These allow the respondent to compose his or her answer rather than choosing between a number of given answers. This may provide more valid data since the respondent he or she can say what he means in his or her own words (Babbie1998: 167). This kind of response may be difficult to classify or quantify.

- Close ended questions or structured questions

Closed ended questions are of a great variety for example multiple choice questions, yes or no, agree or disagree, matching, true – false. Other responses can include strongly agree or strongly disagree, depending on the type of data the researcher wishes to gather from respondents (Babbie, 1998: 169).

- Check list: Provision of a list of responses from which selection is made

- Multiple choice questions: offer a list of responses to respondents, usually in statements, from which they can select one most applicable to them.

3.3.2 Population and sampling

There are hundred and twelve schools in the Zeerust APO. They consist of primaries and secondary schools. The population is hundred and twelve principals. All the principals were selected to participate in the study. In other words hundred and twelve copies of questionnaires were given to principals of Zeerust APO to respond to questions.

3.3.2.1 Pre- testing

The questionnaire was pre-tested on a small group of (5) respondents. Improvements were made and the final approval was given to respondents.

3.3.2.2 Covering letter

A covering letter was requested from the supervisor to be presented to the institutional support coordinators of respective clusters for permission to distribute questionnaires in their schools. This letter was photocopied and given to all hundred and twelve (112) schools.

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3.3.2.3 Letter of explanation

The letter of explanation was written by the researcher to explain the purpose of the questionnaire and it was attached to copies of the questionnaire.

3.3.2.3.1 Administration

Copies of the questionnaire were delivered personally to principals. The return date was given on the letter of explanation. Where a principal was inaccessible some copies of questionnaires were left at the Zeerust Area Project office where one staff member distributed them to principals.

3.4 Follow up

Follow-ups by telephone calls and visits were carried out by the researcher in a situation where the questionnaire was forgotten to be filled in or forgotten at home or having been misplaced.

3.5 Response rate

According to the researcher's point of view the response was excellent. The total number of copies of the questionnaire distributed was one hundred and twelve (112). Of the one hundred and twelve (112) one hundred (100) copies were returned except twelve copies of the questionnaire were not received.

The interest and willingness of principals to participate in the answering of the questionnaire was good. The reason being the subject of the questionnaire was a sensitive issue. Some principals even suggested that on completion of the research the findings should be made available to the department of education specifically to those who deal with norms and standards to improve their shortcomings.

3.4 Statistical technique

An analysis of research questions was done using excel programmes to calculate frequencies, percentages and different graphs and tables.

3.5 SUMMARY

The research instrument chosen was a questionnaire to allow the respondents to think about the questions and respond accurately. This is the researcher's choice based on the advantages of a questionnaire and the need to reach all the respondents. It is the researcher's belief that the statements in the questionnaire were carefully selected and constructed.

CHAPTER FOUR

4. DATA ANALYSIS AND INTERPRETATON OF RESULTS

4.1 Introduction

Chapter four concerns data collected empirically from respondents through questionnaires and analysis of data on perceptions and perspectives of principals about funding of schools and problems they encounter. The following discussion focuses on synopsis of data collected and the implications of the results.

4.2 Review of respondents

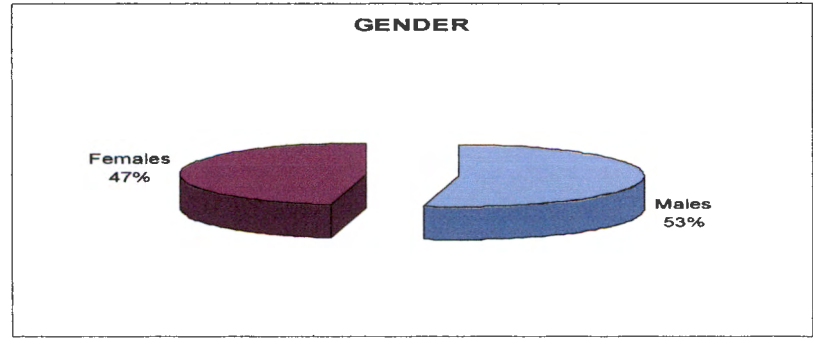
One hundred and twelve respondents (112) were targeted. Of these only twelve (12) respondents did not return the questionnaire and one hundred (100) respondents which is 89.3%, did. All of the 100 returned copies of the questionnaire were usable.

4.3 BIOGRAPHICAL DATA OF THE RESPONDENTS

Information concerning biographical data of respondents is provided in this chapter. This information outlines who, the respondents were their gender, age, qualifications and their experience as principals.

4.3.1 GENDER OF THE RESPONDENTS

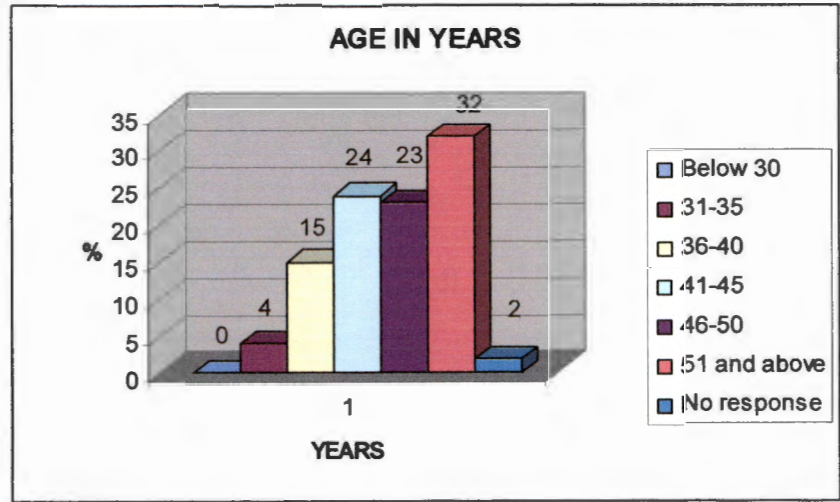
FIGURE 4.1 Gender



The respondents were asked to indicate their gender. Figure 4.1 showed that the sample was made up of 53% of males and 47% of females which still indicated that the leadership positions were still male dominated. It was quite evident that managerial positions were also occupied by women; according to the percentages from the diagram it was clearly indicative that the females were in the minority as compared to men.

4.3.2 AGE OF THE RESPONDENTS

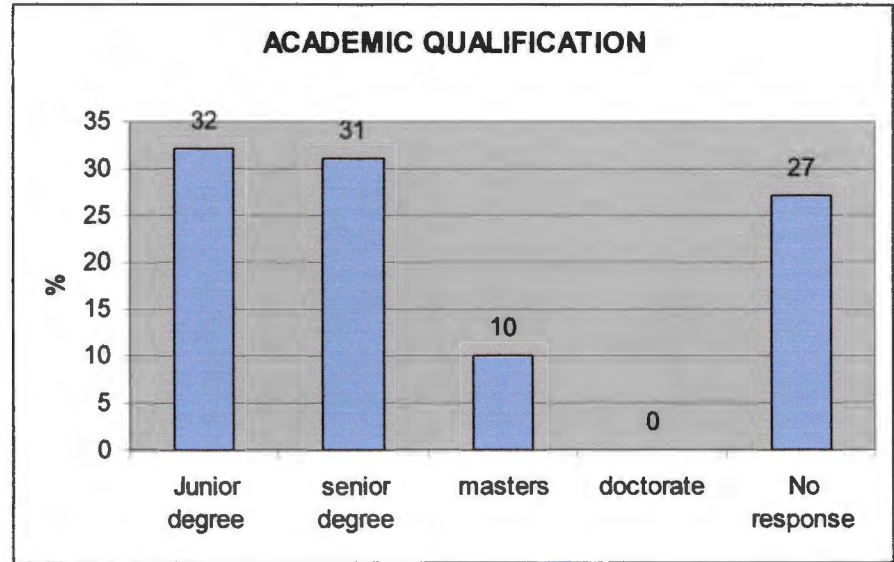
FIGURE 4.2 Age in years



Six age groups were supplied and the respondents chose the category most relevant to their ages. Figure 4.2 indicated that there were no respondents below the age of 30 who were principals, 4% of the respondents were between 31 – 35 years of age, 32% of the respondents were 51years and above. More than 60% of the respondents were below 51 years of age; this meant that most of the respondents were young their ages allowed them the opportunity to occupy the managerial position for a longer period before they retire.

4.3.3 ACADEMIC QUALIFICATIONS OF THE RESPONDENTS

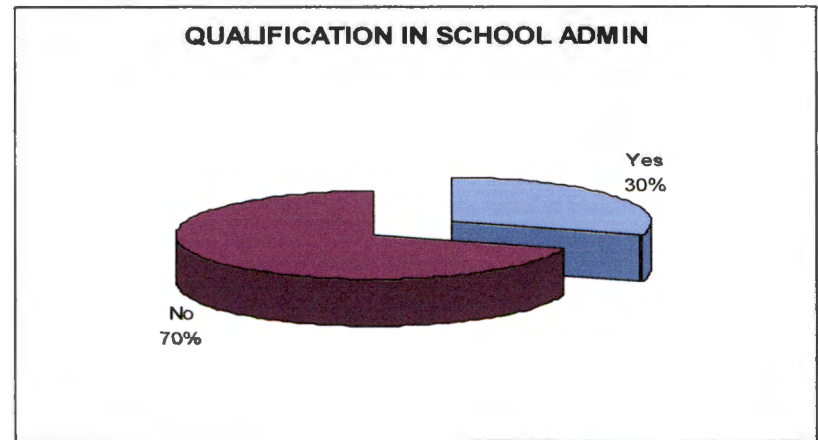
FIGURE 4.3 Academic qualifications



The respondents were requested to state their academic qualifications. Figure 4.3 showed that 32% were respondents with junior degree, 31% of participants had a senior degree, 10% were respondents with masters degree, doctorate was 0% and 27% did not respond to the prompt. Most of the respondents had junior and senior degrees which suggested that the principals were interested in improving their qualifications.

4.3.4 QUALIFICATIONS IN SCHOOL ADMINISTRATION OF RESPONDENTS

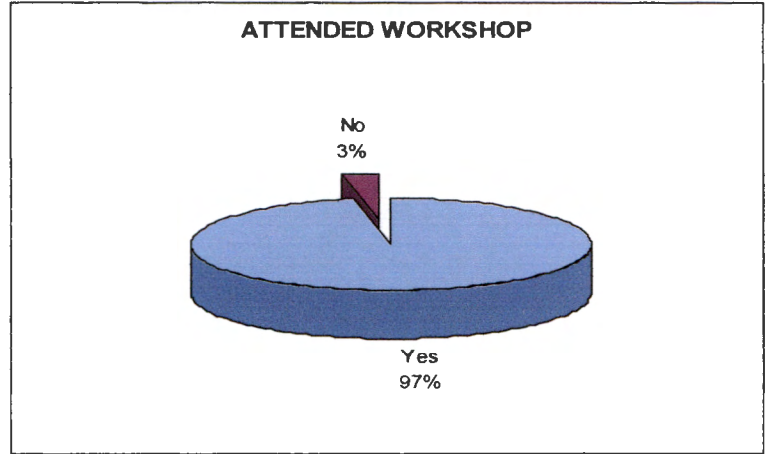
FIGURE 4.4 Qualifications in school administration



The respondents were requested to indicate whether they had administrative courses or not. The response showed that 30% of the respondents had administrative qualifications whereas 70% did not have administrative qualifications. The majority of respondents did not have administrative qualifications this meant that the respondents require more skills on administration.

4.3.5 WORKSHOPS ATTENDED BY RESPONDENTS

FIGURE 4.5 Attended workshops



The participants were requested to choose between yes or no to indicate whether they attended workshops relating to management and administration. Figure 4.5 indicated that 97% of the respondents attended workshops relating to management and administration and only 3% did not attend. This meant that principals were empowered to deal with matters related to management and administration.

4.4 SCHOOL INFORMATION AND FUNDING

This section outlined the school information and funding like the location of the school, money allocated to schools, other sources of income, total income per school per year, paper budget for 2006, quintiles, parents who paid school fees and learners who were exempted from paying school fees. The information was important as it enabled the smooth running of the school. The information described the position of Zeerust APO' schools in terms of how rural the area was.

4.4.1 LOCATION OF THE SCHOOL

TABLE 4.1 School's location

School location	%
Urban area	11
Informal settlement	00
Rural area	89
Total	100

In Table 4.1 respondents were requested to indicate the location of their schools, whether their schools were in an urban area, informal settlement or in a rural area. Table 4.1 indicated that 11% were schools in an urban area, there were no schools in the informal settlement and 89% were schools situated in a rural area. The majority of the schools in Zeerust APO were located in rural areas.

These findings emphasised the importance that rural schools should be funded by the government. The fact that the majority of schools in the Zeerust APO are located in rural areas where there are no job opportunities is an indication of low socio – economic status of the people who should be assisted more than others.

4.4.2 AMOUNT ALLOCATED TO SCHOOLS

TABLE 4.2 Money allocated

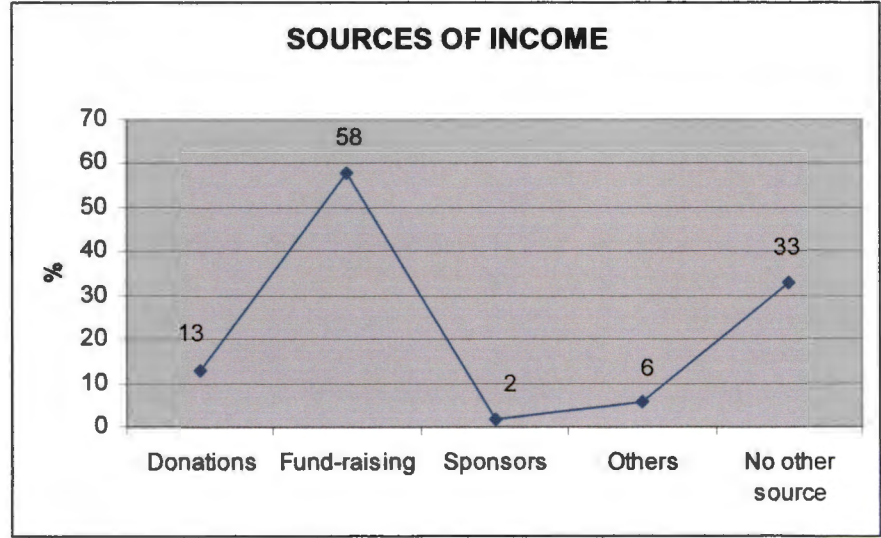
Money allocated	%
1 000- 9 000	15
10 000 – 20 000	22
21000 – 60 000	39
61 000 – 100 000	21
Above 100 000	3
Total	100

The respondents indicated the money allocated to their schools in 2006. Table 4.2 showed that 15% of the respondents their schools received 1 000 – 9 000, 22% of schools received between 10 000 – 20 000, 39% of schools were allocated 21 000 – 60 000, 21% were given between 61 000 – 100 000 and lastly 3% of schools were given 1000 000 and above. The majority of the respondents (39%) received an allocation of 21 000 – 60 000.

This table implied that all the schools received money allocated to them no matter how little it was because no school has indicated that they did not receive the funds. The Table clearly showed that the schools that received the lowest amount were only 15% + 22% = 37% which meant that most schools received money more than R20 000.

4.4.3 OTHER SOURCES OF INCOME

FIGURE 4.6 Other sources of income



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The respondents were to state other sources of income in addition to school fees charged yearly. Figure 4.6 showed that 13% of schools received donations, 58% augmented the school’s coffers by raising funds, 2% of schools were sponsored by companies, 6% of schools received money from other sources not mentioned and 33% depended solely on school fees and money received from the department of education North West Province.

These findings showed that principals raised funds a lot to augment school funds. They raised funds to meet the needs of the schools. This also showed that the principals were empowered that is why they were able to raise funds.

4.4.4 TOTAL INCOME OF THE SCHOOL IN 2006

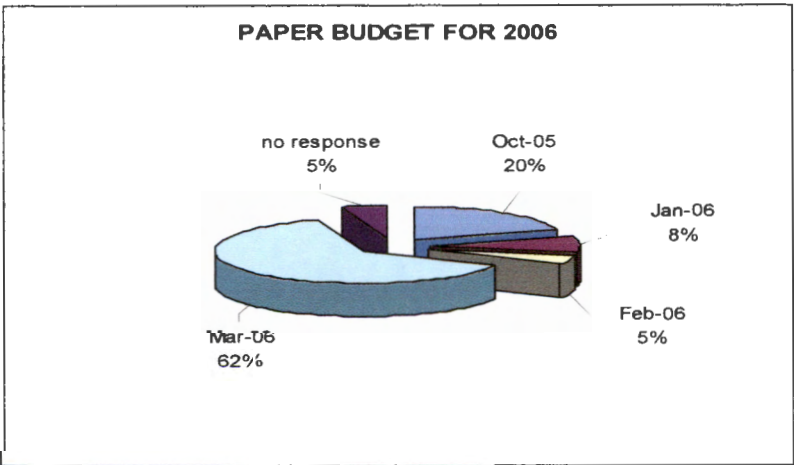
TABLE 4.3 Total income in 2006

1 000 -10 000	13
11 000 – 30 000	22
31 000 – 60 000	24
61 000 – 100 000	26
100 000 and above	15
Total	100

Schools did not have the same amount of money, thus respondents were asked to indicate the category in which their school fell with regard to the amount of money they had in their coffers for the year 2006. Table 4.3 revealed the following data 13% of the schools’ income were between R1 000 and R10 000, 22% between R11 000 and R30 000, 24% between R31 000 and R60 000, 26% between R61 000 and R100 000 and 15% was R100 000 and above. This suggested that at least all the schools had money in their coffers. The table indicated that 15% of schools had ± R100 000 in their coffers and 13% of schools survived the year with only ± R1 000 to R10 000. This implied that there are still schools which need extra funding. There are schools which still operate with the money under 30 000 for the whole year.

4.4.5 PAPER BUDGET FOR 2006

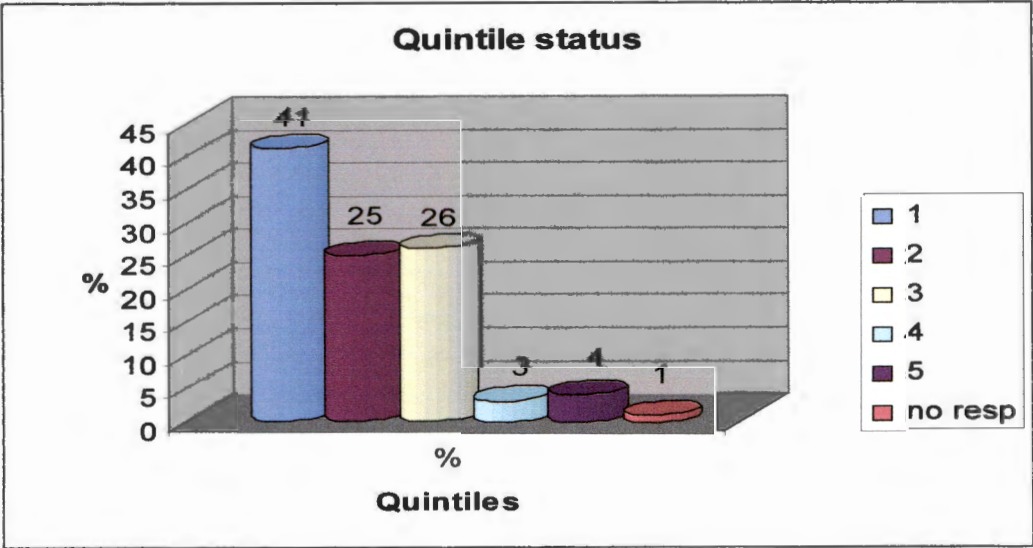
FIGURE 4.7 Paper budget for 2006



The paper budget is the information sent to an individual school which includes the total estimated amount that will be allocated to a school the following year. It is usually sent to a school in October to allow a school to budget for the following year. The respondents were requested to indicate in months when did they receive the paper budget. Figure 4.7 indicated that 20% of schools received the paper budget in October 2005, 8% in January 2006, 5% in February 2006, 62% received their budget in March 2006 and 5% did not receive the budget paper. The implication was that most of the schools received their paper budget during March 2006 when it was supposed to have been received the previous year in October; the late arrival of the paper budget may impact negatively on the financial planning process for the next academic year.

4.4.6 SCHOOL STATUS CONCERNING QUINTILES

FIGURE 4.8 Schools quintile status

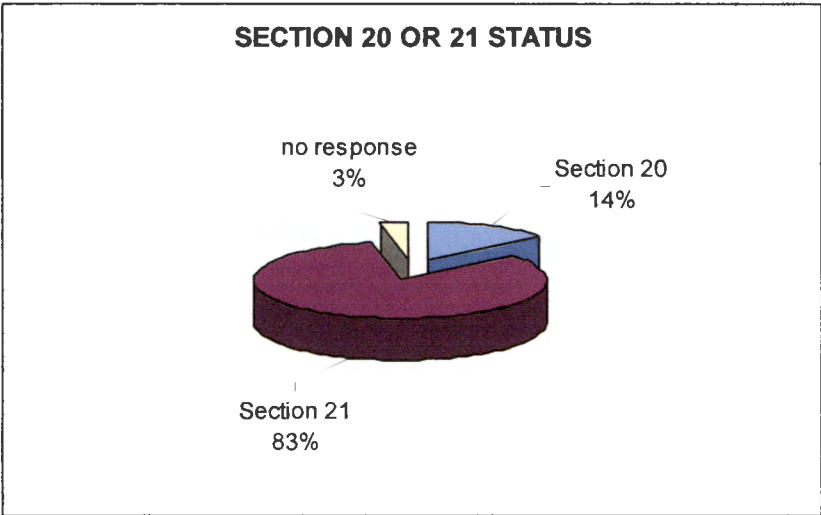


Quintiles 1 – 5 were given where the respondents chose the appropriate quintile. Figure 4.8 indicated that 41% of schools were in quintile 1, 25% of school were in quintile 2, 26% of schools were in quintile 3, 3% of schools were in quintile 4 and 4% of schools were in quintile 5. The findings indicated that 92% of schools were in quintile 1 to quintile 3. It meant that most schools in the Zeerust APO were poor. According to

minister of education those schools were to apply to become no fee schools to stand a chance of receiving an increased allocation the following year.

4.4.7 SECTION 20 AND SECTION 21 STATUS

FIGURE 4.9 Section 20 or 21 Status



Section 20 schools are schools that do not manage the money allocated to them the money is kept in the coffers of the regional education department. To access their money such schools have to submit requisitions forms to the APOs to receive the required item for example duplicating papers, cleaning material, physical resources like photocopiers. Section 21 schools are schools responsible for managing funds allocated to them. The funds allocated to section 21 schools are deposited to the various schools' bank accounts to be utilised by individual schools. Schools pay services such as water and electricity. They even buy physical resources for their schools. Schools do not wait for the education department to foot their bills. Figure 4.9 revealed that 14% of schools were in section 20 and 83% of schools were in section 21 and 3% did not respond to the prompt. This implied that the majority of schools in Zeerust APO were granted section 21 status to manage their own funds no matter how poor they were. The department of education so it fit to allow the schools to manage their funds so as to access physical resources swiftly without having to use the middleman.

4.4.7 PARENTS WHO PAY SCHOOL FEES

TABLE 4.4 Parents who pay school fees

School fees	%
Parents who pay school fees	27
Parents who do not pay school fee	73
Total	100

The respondents were requested to choose between parents who pay school fees and parents who did not pay school fees. Table 4.4 signified that 27% of the parents paid school fees whereas 73% of parents did not pay school fees. This suggested that most of the parents did not pay school fees therefore schools had to raise funds because their funds were inadequate. It is very significant that principals should be skilled in raising funds.

4.4.8 EXEMPTED LEARNERS FROM PAYING SCHOOL FEES

TABLE 4.5 Learners exempted from paying school fees

Learners exempted from paying school fees	%
Yes	59
No	40
No response	1
Total	100

The respondents were requested to indicate whether they did exempt learners from paying schools fees. From Table 4.7, 59% of schools exempted learners from paying school fees and 40% of schools did not exempt learners from paying school fees and 1% did not respond. This meant that most of the principals did implement the policy of exempting learners from paying schools. This is a clear indication that some parents did not pay school fees even if they afford to pay school fees. It also signified that the funds were inadequate in some of the schools.

4.4.9 IS THERE A REDUCTION FOR PARENTS WHO PAY WELL IN ADVANCE

TABLE 4.6 Reduction of school fees

Reduction of school fees	%
Yes	23
No	71
No response	6
Total	100

Some schools in order to encourage parents to pay school fees used the approach of reducing the amount for early birds payers. Table 4.6 reflected that 23% of schools did give parents a certain reduction in paying school fees in advance and 71% of schools did not give reduction and 6% did not respond. The results showed that most of schools principals in the Zeerust APO did not apply the system of reduction of payment for parents who have paid on time or well in advance.

4.5 VIEWS AND KNOWLEDGE ABOUT SCHOOL FUNDING (constraint on funding)

In this section principals were requested to indicate knowledge about schools funding; knowledge such as parental involvement in the institutions, constraints concerning staffing and funding. What is the significance of the term school size, no fee schools whether the respondents who are in section 20 status have received items they have ordered from the department of education.

4.5.1 PARENT INVOLVEMENT

Table 4.7 Parent involvement

Parent involvement	%
Strong parent involvement	25
Poor parent involvement	30
Moderate involvement	45
Total	100

The participants were given three categories to choose from where they were suppose to indicate whether the parent involvement was strong, poor or moderate. The table showed

that most parents were involved even if there were those who were not totally involved, but at least 65% of parents were involved in school matters. Parental involvement may also imply that parents are involved in the decision making of matters related to school funds.

4.5.2 SCHOOL FUNDING

Table 4.8 School funding

School funding	%
Inadequate funding	63
Adequate funding	4
Satisfactory funding	33
Total	100

The respondents were requested to indicate whether the funds allocated to schools were adequate, inadequate and satisfactory. From the Table 4.8 it was evident that the majority of the respondents felt that the school allocation was not enough. It was evident that most of the schools were unable to meet all the needs of the school.

4.5.3 THE SCHOOL SIZE

Table 4.9 The school size

The school size	%
Small schools	35
Large schools	65
Total	100

The respondents were asked to indicate the size of their schools by choosing between small and large schools. One criterion used to allocate funds to schools is the size of the school. The number of learners enrolled to a school for that year irrespective of the uniqueness and the individuality of a school in the same area. Table 4.9 showed that 35% were low enrolment schools whereas 65% were schools with high enrolment. It is indicative that most schools had high enrolment. This implied that most of the large

schools that participated in the study were allocated more funds as compared to small schools.

4.5.4 REQUISITIONS RECEIVED

TABLE 4.10 Requisitions received by section 20 schools

Requisitions	%
Yes	08
No	06
Total	14

This item wanted to find out whether schools in section 20 did receive their requisitions. Section 20 schools made 14% of the whole population. Table 4.10 showed that 08% of the respondents did receive their orders and 6% of the respondents did not receive their orders. This meant that the section 20 schools which did not receive their orders would receive their orders the following year the money allocated to their schools would be returned to the treasurer. This was a drawback to schools which did not receive their allocation because it meant that for that year their money allocated was not fully utilised.

4.5.5 READINESS FOR NO FEE SCHOOL

TABLE 4.11 Readiness for no fee schools

Readiness for no fee schools	%
Ready	21
Not ready	79
Total	100

The respondents were asked for their views on whether South Africa was ready for no fee schools. Table 4.11 showed that 79% disagreed that South Africa was ready for no fee schools and 21% agreed that South Africa was ready. The results revealed that the respondents were not confident enough that South Africa would manage to fund the no fee schools.

4.6 SUMMARY

Chapter four focused on the findings of the study and the data revealed that the gap was not that much between males and females principals who occupied managerial positions. Most of the principals in Zeerust APO were over the age of forty. The majority of principals in the Zeerust APO have junior degrees and senior degrees. The schools in Zeerust APO are mostly located in the rural areas. Almost 77% of the respondents received their allocation for 2006 even if they received it during the third and fourth quarter. It is understandable that schools in Zeerust APO raise funds a lot because they are located in rural areas where the socio economic conditions are poor. In addition most schools are in section 21, it is reasonable enough because most of the principals attended workshops therefore they have capacity to handle funds. The majority of the schools are in quintile one and two because of the rural nature of the place. Most of the principals raise funds. On the whole school funding in Zeerust APO is not entirely gloomy but a small element of improvement is needed.



The major findings are as follows:

- Most of the schools in Zeerust APO have a total income of R61 000 up to ± R100 000;
- Principals in Zeerust APO have a capacity to handle funds because they are granted section 21 status;
- Most parents do not contribute money to schools hence a higher percentage of learners who are exempted from paying school fees; and
- Schools with high enrolment receive more funds as compared to low enrolment schools.

CHAPTER FIVE

5. SUMMARY, RECOMMENDATION AND CONCLUSION

5.1 Introduction

The objective of this chapter is to give a brief summary of each chapter of this research study. The chapter will also provide major findings drawn from the study as related to the aims outlined in chapter one. Furthermore, recommendations for school funding are cited.

5.2 SUMMARY

In chapter 1 the background information, the aim of the study and a statement of the problem are presented. A concern was presented about funding of schools in an equitable manner (cf.1.1;1.2) and problems experienced by principals with regard to school funding(cf.1.3). In different countries education departments are committed in funding schools but there is still a problem of bridging gaps between the affluent communities and poor communities. In most of rural schools enrolment is low as compared to urban schools and the enrolment determines the allocation that the school will receive for each year it therefore necessary that new criteria should be sought to assist the poverty stricken schools.

Chapter 2 reflected data from different countries, the developed and the developing countries, to discover how they fund their schools. The literature consulted revealed that developed countries, for example Germany, funding is funded by the government if the medium of instruction is German (cf.2.4.3). Education in Germany is funded by parents if a child is not in a government school (cf.2.4.3). From literature consulted all countries are committed to funding basic education. Kenya struggles to finance education because of insufficient funds (cf. 2.4.7).

Chapter two also focused on how funds received are used by schools (cf.2.3.1). An investigation on how other countries fund their schools and the mechanisms used to distribute the funds among schools refer to Table 2.2 Belfast allocation of funds (cf.2.4.1)

In this chapter the focus was also on South African policies and legislative framework since these are important in understanding how schools are funded.

Chapter three outlines the methods of research and an instrument used to conduct the research. It also gives an overview of the steps taken to administer research. A questionnaire was chosen as the tool to collect data empirically to gather views and opinions about school funding. The advantages and disadvantages of a questionnaire were cited, how to design types of questions and how respondents responded to the questionnaires. Chapter four focused on the data collected, analysis and interpretation, based on the findings from the empirical investigation. The source of data is the questionnaire as completed by the respondents.

5.3 Research findings

5.3.1 Findings on the first aim,

This study (cf.1.3), with regard to the first aim which was to determine from the literature the nature and scope of school funding, the following findings were revealed:

- Government funding is one of the source of income for the school (cf.2.2);
- All countries mentioned under literature study fund basic education (cf.2.4);
- Funding of schools is decentralised either locally or provincially;
- Basic education is compulsory from the age of six or seven to the age 14 to 16;
- The increase in expenses accelerated a financial crisis in education (cf.2.1);
- The increase in education expenditure resulted in urban areas afford better facilities than poorer rural areas (cf.2.4.2); and
- Distribution of state funds in education is determined by the number of children attending school (cf.2.4.3).

- In the United State provision is made for poor learners the programme is referred to as ‘chapter two’.
- Education is the responsibility of the government but it cannot manage alone in developing countries. Bodies like NGOs, companies have to assist.

5.3.2 Findings of aim two

Relating to the second aim, namely, to determine empirically the problems experienced by school principals with regard to school funding, findings are as follows:

- Most of Zeerust APO schools are located in rural areas (cf.4.4.1);
- A high number of schools are able to raise funds; they do not solely depend on funds allocated by the department of education. Only few schools are depended on education funds(cf.4.4.3);
- Paper budget is not received on time to allow principals to budget for the following year (cf. 4.4.5);
- Most of the schools in Zeerust APO are in quintile one, two and three (cf.4. 4.6);
- Most of the parents in Zeerust APO do not pay school fees (cf.4.4.8);
- Most of the learners are exempted from paying school fees (cf.4.4.9);
- Most parents are involved in school affairs in Zeerust schools (cf.4.5.1);
- The majority of schools indicated that funds allocated to schools are inadequate (cf.4.5.2); and
- The size of the school is used as one of the mechanisms to allocate funds to schools (cf.4.5.4).

5.4 RECOMMENDATIONS

Recommendation 1

The department of education in the North West Province should review mechanisms used to determine allocation of school funds.

Motivation

Schools need to be supported financially to effect quality education and administration. A thorough investigation on factors used to determine school fees should be conducted involving all stakeholders. A task team with the following members, principals of schools with high enrolment, principals of schools with low enrolment, principals of farm schools and principals of schools from urban areas and principals of schools from rural areas. This will help because everybody will be able to voice out his or her experiences.

Recommendation 2

Enrolment should not be the final determining factor of allocating funds to schools. Schools with low enrolment suffer from receiving low income. There has to be a programme for rural areas to benefit schools with insufficient funds.

Motivation

There should be a programme for financially disadvantaged children to acquire basic academic skills and enhance opportunities to participate in society. This programme should focus on general improvement of education rather than on narrow categorical activities. The schools have to acquire the best understanding of the needs of the school, the learners and that they must be given the flexibility to use this understanding in a way that will best serve the disadvantaged learners.

Recommendation 3

Adopt a school (by companies) project

Motivation

Schools should strive for adoption by companies to enable schools to be provided with basic needs like computers, photocopiers, library material, laboratory equipments and so forth. This might assist schools to perform well and might encourage everybody to work hard.

Recommendation 4

Management should be trained on fundraising, development of budget and related plans.

Motivation

Some school management teams lack knowledge on fundraising, writing letters to big companies to request sponsorships and donations. Workshops should be conducted to empower management teams. The education department has to design strategies to help principals' of schools to be able to can raise funds for their schools. Companies have to adopt schools so that they could help schools with physical resources such as photocopiers, computers and library books. This will alleviate a great burden that the education department is phased with. The education department also need to encourage companies to assist schools.

5.5 CONCLUSION

In conclusion, for any school, organisation or institution to survive to improve its performance, to achieve goals set, it needs funds to manage the capacity involved. The focus in education is quality results. Currently performance has taken a focal point. For South Africa to bear fruits from its economy it needs high standards of educational skills to compete with the global world. It is for schools to match the required standards therefore for schools to perform well there has to be sufficient funds to enable them to purchase the tools that will improve performance.

This study suggests quality education but to realise it the education department has to seek ways to continuously meet the anticipated demands for increased short term and long term funding. There is an increased demand for schools that performs well. Parents enrol their children in better schools, schools that have everything. The migration of learners from rural and township schools to former model C schools could stop if all the schools were well subsidised.

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ANNEXURE A

To: Respondents
From: YS Noge
Date: November 2006

Dear Respondents

May I take this opportunity to request you to complete the attached questionnaire which will be used solely for research purposes.

Your cooperation will be highly appreciated as it will help us to improve the funding of schools by the department of education.

Feel free to complete the questionnaire as the information supplied is confidential. You are not required to write your name of the school on the questionnaire.

Kind regards
YS Noge

ANNEXURE B

THE QUESTIONNAIRE

SECTION A BIOGRAPHICAL DATA

INSTRUCTIONS TO ALL RESPONDENTS

Mark the most appropriate box with an X; respond accordingly to yes or no questions.

1. Gender

M	F
---	---

2. Age in years

Below 35 years	
36 – 45	
46 -50	
51 and above	

3. Highest academic qualifications

Junior degree	
Senior degree	
Masters degree	
Doctorate	
None	

4. Do you have any qualifications in school administration?

Yes	No
-----	----

5. Did you attend workshop(s) on matters pertaining to administration organised by the education department?

Yes	No
-----	----

SECTION B: SCHOOL INFORMATION AND FUNDING

Mark the most appropriate box with an X and respond accordingly to YES or NO questions.

6. Which of the following best describes the location of your school?

School location	
Urban area	
informal settlement	
Rural area	

7. The money allocated to schools is between the following ranges:

1 000 - 9 000	
10 000 - 20 000	
21 000 - 60 000	
61 - 000 - 100 000	
above 100 000	

8. Other sources of income

Donations	
Fund raising	
Sponsors	
Others	
No other sources	

9. What is the total income of the school in 2006?

1 000 - 10 000	
11 000 - 30 000	
31 000 - 60 000	
61 000 - 100 000	
100 000 and above	

10. When did you receive your paper budget for 2006?

October 2005	
January 2006	
February 2006	
March 2006	
Did not receive	

11. What is the school status concerning quintiles?

1	2	3	4	5
---	---	---	---	---

12. What is the school status concerning section 20 or section 21?

20	21
----	----

13. Do parents pay school fees?

Parents who pay school fees	
Parents who do not pay school fees	

14. Do you exempt learners from paying school fees?

Yes	No
-----	----

SECTION C: VIEWS AND KNOWLEDGE ABOUT SCHOOL FUNDING

Mark the appropriate box with an X and respond accordingly to Yes or No questions.

15. Do you encourage parents to pay school fee on time by reducing a certain percentage when they pay the school fees in advance?

yes	no
-----	----

16. Do you experience problems in parent involvement or not?

Parent involvement	
Strong parent involvement	
Poor parent involvement	
Moderate involvement	

17. Do you have constraints in school funding?

School funding	
Inadequate funding	
adequate funding	

18. What is the size of your school?

School size	
Small school	
Large school	

19. Are requisitions received for 2006?

Yes	No
-----	----

20. Do you think that South Africa is ready for no fee schools?

Yes	No
-----	----

Thank you for your participation



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19 January 2006

Central Region
Zeerust APO

Permission to conduct research - Mrs. Yvonne Semake Noge student no: 10646302

This letter serves to introduce Mrs. Y. S Noge, who is presently a registered student in the MBA programme at the Graduate School in the North West University. She is conducting a research project on, "Funding of schools by the education department in Zeerust Area (Norms and standards)" towards a partial requirement or the fulfillment of her Masters Degree in Business Administration.

In this regard, your department is requested to afford her full co-operation to conduct her research in order to complete her study and contribute toward research in this area. In particular, Mrs. Noge requires permission to access information, data or even to distribute questionnaires to various branches.

Please forward your response directly to Mrs. Noge, in order to aid her logistical planning.

Your cooperation is highly appreciated.



Dan Setsetse
Programme Director

